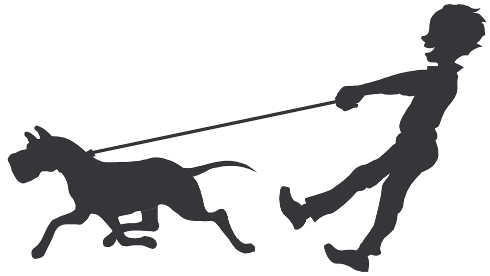
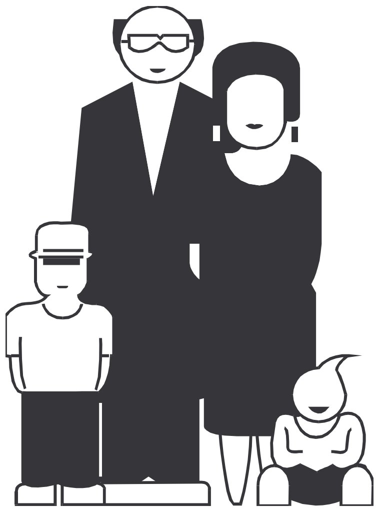



ASSIST

BASIC

User Guide

October 19, 2005


ASSIST BASIC USER GUIDE

TABLE OF CONTENTS

Introduction

The ASSIST User Guides are designed to take a user step-by-step through ASSIST functions. Because there are many different areas of specialization (i.e. Adult Services, Family and Children Services, etc.) these guides are divided into separate booklets. For Release 2, there are 6 guides:

- ASSIST Basic User Guide
- ASSIST Adult Protective Services User Guide
- ASSIST Child Protective Services User Guide
- ASSIST Supervisor/Manager Guide
- ASSIST Mentor Guide
- ASSIST County System Administrator Guide

The Basic User Guide contains instructions for procedures that are common to all areas. All groups should use this Guide.

The Adult Protective Services User Guide contains instructions for Adult Protective Services Intakes and Investigations.

The Child Protective Services User Guide contains instructions for Prevention Referral Intakes and Assessments and Child Abuse/Neglect Intakes and Assessments.

The Supervisor/Manager Guide contains instructions for procedures that can only be performed by supervisors, program supervisors, and county directors.

The Mentor Guide contains instructions for procedures that can only be performed by ASSIST Mentors.

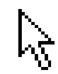
The County System Administrator Guide contains instructions for maintaining elements of the ASSIST system at the county office level.

Using the Mouse

The following describes the different ways that a mouse is represented on your screen.

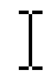
The Pointer

The pointer is the primary navigator. It controls point-click movement using either a point or an I-beam. It often looks like an arrow.



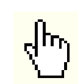
The I-Beam

The I-beam is used to insert text or numbers in any software program (for example, Word or Excel). It looks like a capital I.



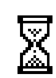
The Hand

The Hand indicates when the pointer is positioned over a link. Links are indicated by hypertext, which is usually a different color from the surrounding text and underlined. Clicking on hypertext (when the pointer is the Hand) takes you to the location to which the link points (usually another web page or another location on the same web page).



The Busy Indicator

When the computer is processing input, a busy indicator, usually an hourglass, is displayed.



Left-Handed Users

Mouse buttons can be switched for left-handed users. After switching, just reverse the left (primary) and right mouse instructions.

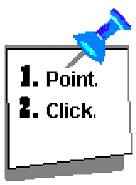
Step	Action
1	Point at **Start** on your Windows 95/98 desktop.
2	Scroll up to **Settings**.
3	Click on **Control Panel**.
4	Double Click on **Mouse**.
5	Click on the **Buttons** tab.
6	Under Button configuration, click on the radio button to change to left-hand.
7	Click on **OK**.

Mouse Actions

The following table describes the mouse actions used when navigating the Windows 95 and ASSIST desktops.

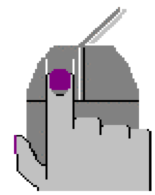
Mouse Action	Description
Point-Click	Primary mouse action
Point Double Click	Launches an application
Point-Click Type	Used to insert text or numbers
Point-Drag-Drop	Moves an icon, file, text, or number from one location to another.

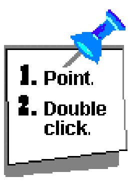
Examples:



Most point-click activity is a **single**, quick click using the primary or left side of the mouse. Point and click to:

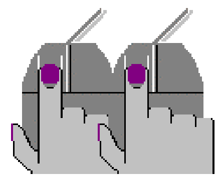
- ✓ Highlight an item
- ✓ Insert the I-beam
- ✓ Open and display case information.
- ✓ Print
- ✓ Exit

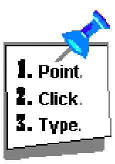




Point double-click activity uses two quick clicks of the primary or left side of the mouse. Point double-click to:

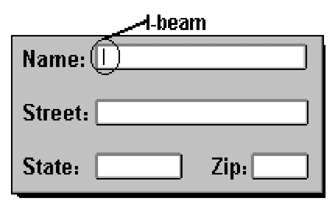
- ✓ Launch or open an application

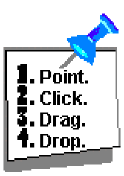




Point-click type action is used extensively in the ASSIST application. Clicking inside a text box activates the I-beam.

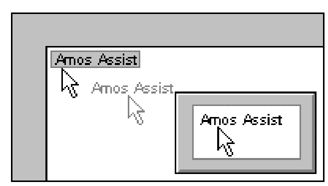
1. Point inside the box.
2. Click and then release the mouse.
3. Type in your information.





Point-click-drag-drop is used to move items and text on a screen from one location to another.

1. Point the arrow over the selected item.
2. Click the mouse button and hold the button down.
3. Drag the arrow to the desired location.
4. Drop the item by releasing the mouse button.



Using the Tab Key

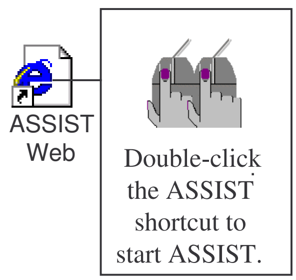
If you prefer to use the Tab key on your keyboard to move the cursor from field to field rather than clicking the mouse, this feature is available.

The ASSIST Web Page

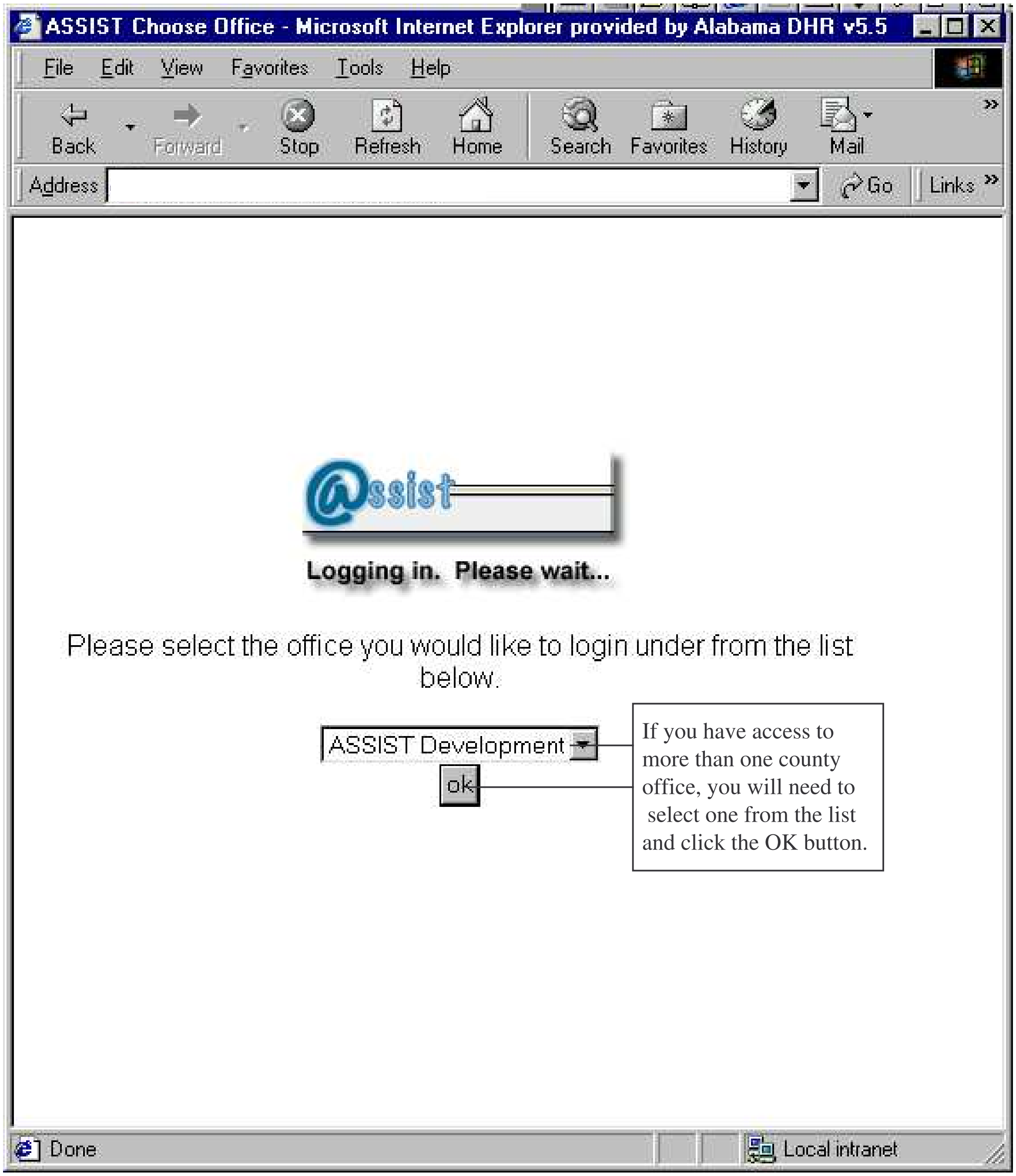
ASSIST is a web-based application. That means the application is not in your computer, but on a server that you access through a network. The network that ASSIST uses is the DHR Intranet. That is In**TRA**net, not In**TER**net. Unlike the Internet, which is a system open to anyone with a computer and internet service provider, the DHR Intranet is a closed system. Only those connected to specific network servers can access the DHR Intranet and ASSIST.

Starting ASSIST

You have been provided a shortcut for the ASSIST application. Double-click this shortcut to start ASSIST.



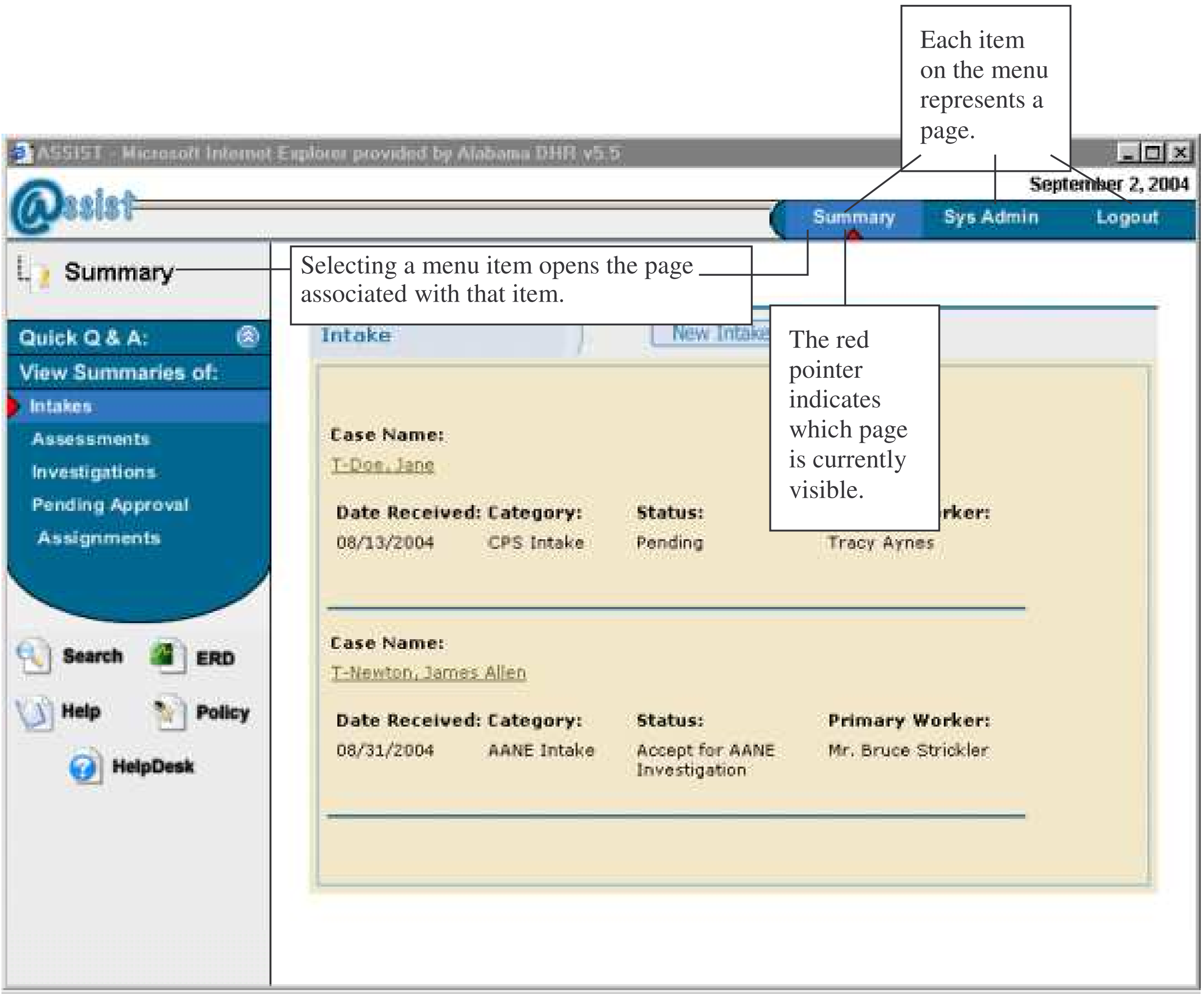
When you double-click the ASSIST Web shortcut, the ASSIST login web page is displayed. This page checks your network login ID (which you entered when you logged onto your Local Area Network (LAN)) to see if you are allowed to use ASSIST. You should wait while the system continues to log you into ASSIST. If you have access to more than one office, you will need to select one from the list and click the OK button.



If your login ID is in the list of people allowed to use ASSIST, the ASSIST Web Page opens.

The ASSIST Menu

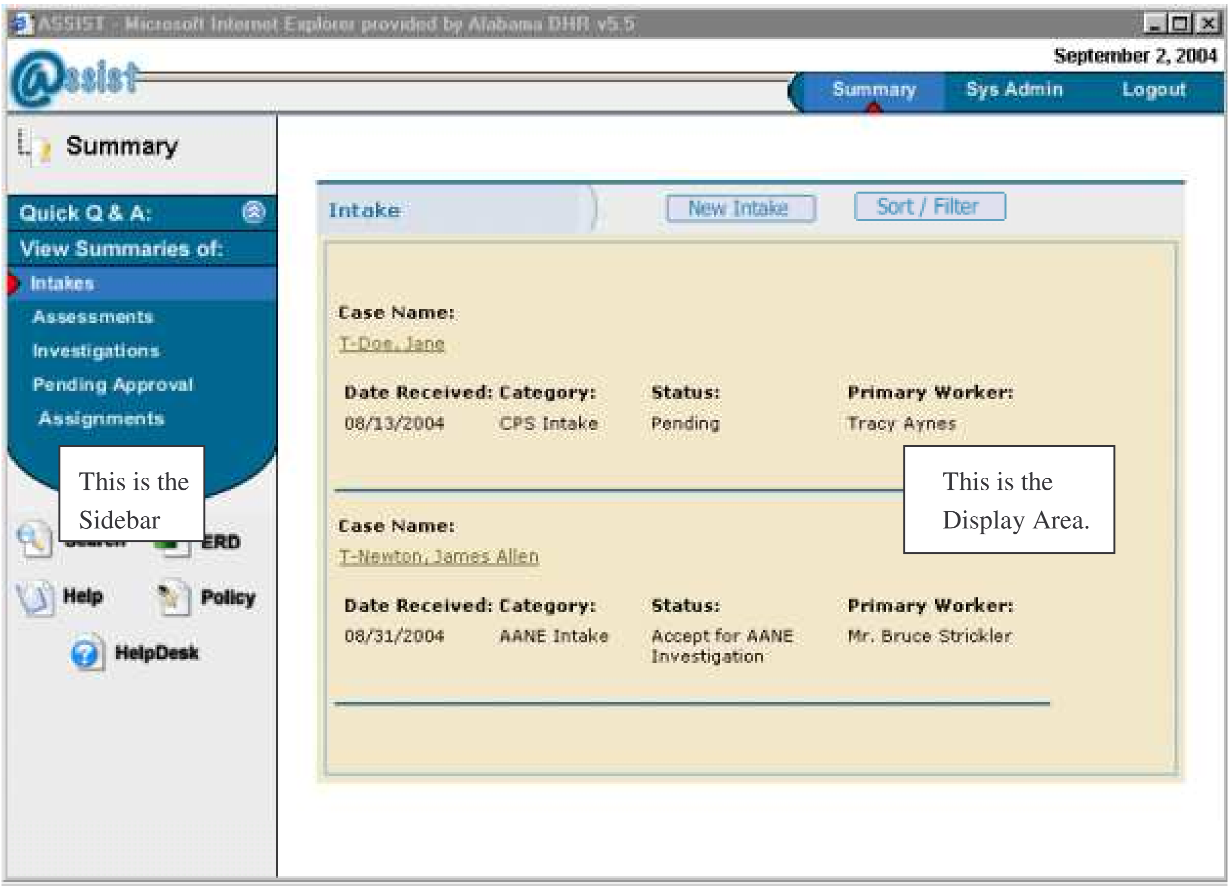
The ASSIST Menu is located across the top of the ASSIST web page. It provides a means to navigate (move around) the ASSIST application. Clicking on a menu item takes you to the associated page. A red pointer indicates which page is currently visible. Your menu may not have all of the items shown below. Only menu items with functions you are allowed to access are shown. For example, Sys Admin (or System Administration) will not be available to most ASSIST users.



ASSIST Pages

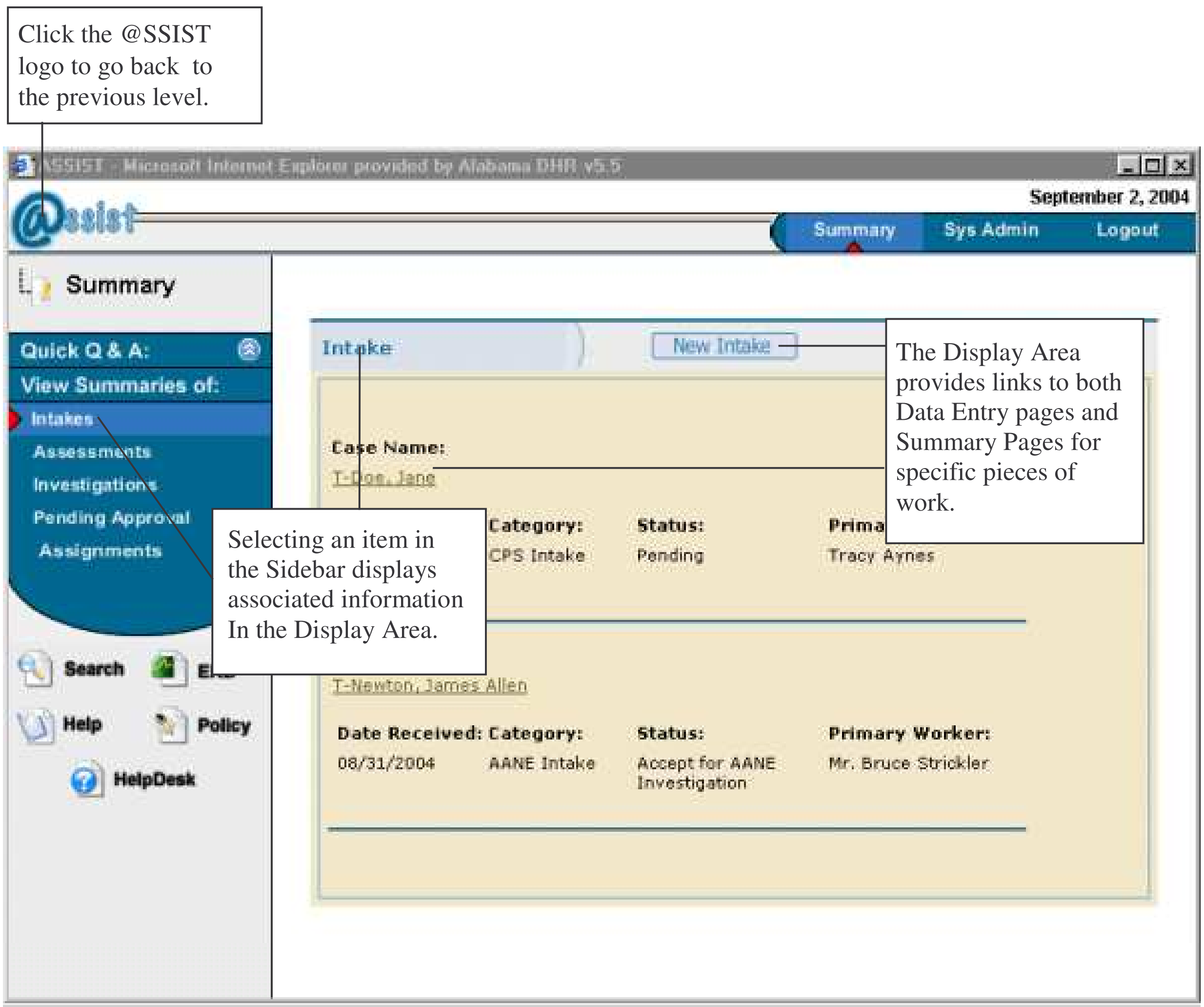
ASSIST is actually made up of several web pages, each providing its own functions. There are two main types of pages in ASSIST, summary pages and data entry pages.

Summary pages have two distinct areas separated by a vertical line: the Sidebar and the Display Area. The Sidebar is to the left of the dividing line, and the Display Area is to the right.



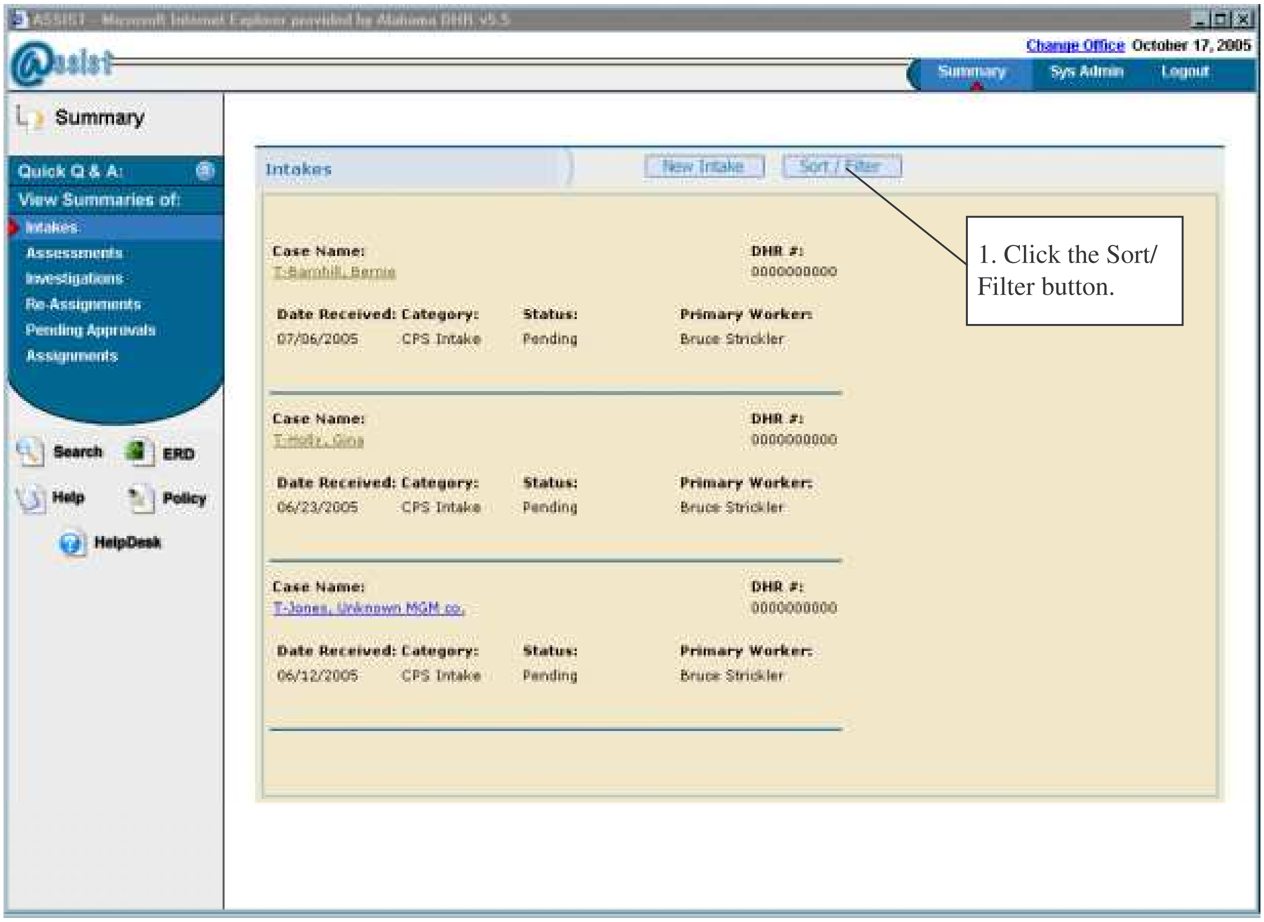
When you click on an option in the Sidebar, you are able to view associated information in the Display Area. The Display Area also contains buttons and links. These allow you to access additional functions. Clicking on a button, such as “New Intake” or “Add Allegation”, will open the associated data entry page. A link is an underlined string of text. If you point your mouse to a link, the arrow will change to a hand. If you click on a link to a piece of work, another Summary page for that specific piece of work will open with its own Sidebar and Display Area.

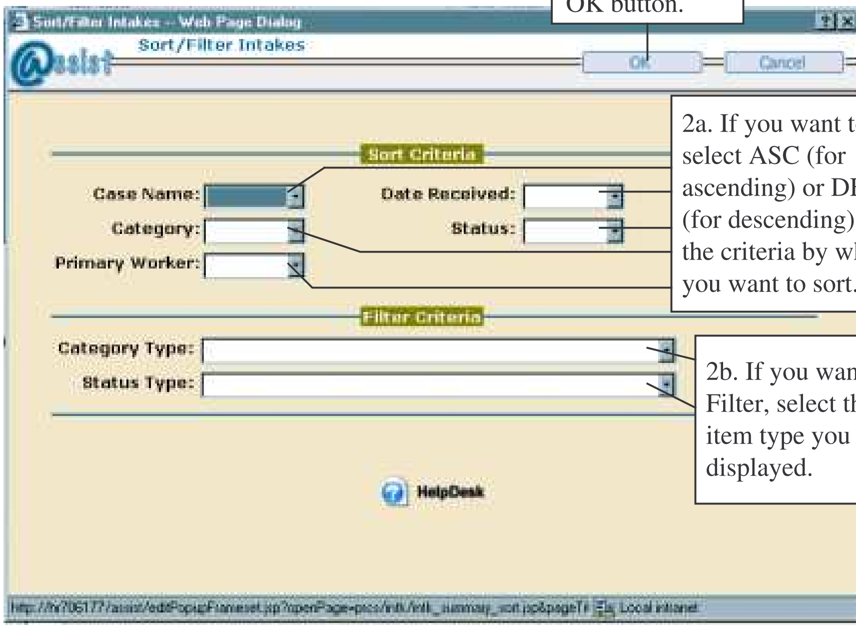
The @SSIST logo in the top left corner of the Assist window acts as a “Home” button, which takes you back to the main Summary Page.



Sorting and Filtering Items on Summary Pages

You can use the Sort/Filter button on the Summary pages to make finding a specific item easier.





3. Click the OK button.

2a. If you want to Sort, select ASC (for ascending) or DESC (for descending) for the criteria by which you want to sort.

2b. If you want to Filter, select the item type you want displayed.

Special Items on the Sidebar

1. The Quick Q & A link is located *above* the list of options and is used to document calls that do not relate to DHR work. Q & A is covered in more detail in the Adult Protective Services and Child Protective Services user guides.

2. *Below* the list of options are five buttons:

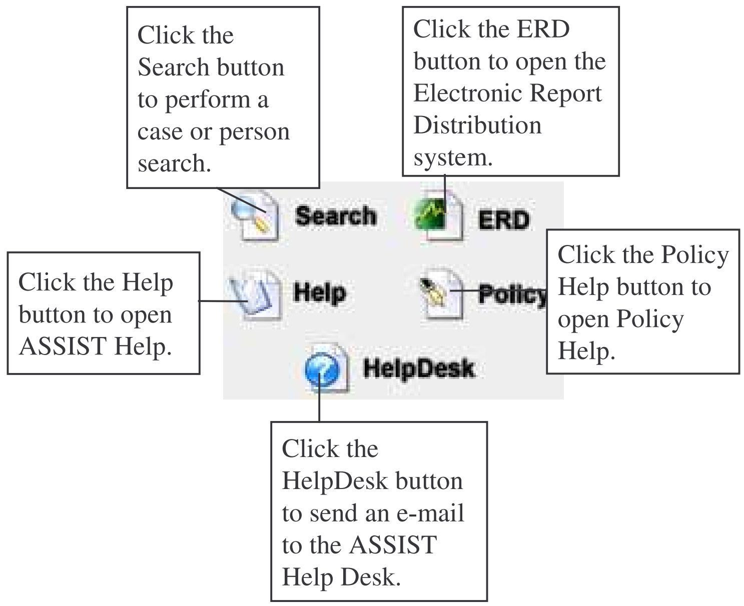
a. The Search button opens the search page, which is used to perform searches for cases, people, and providers.

b. The ERD button opens the Electronic Report Distribution system, which displays reports generated by ASSIST, ACWIS, and FSS.

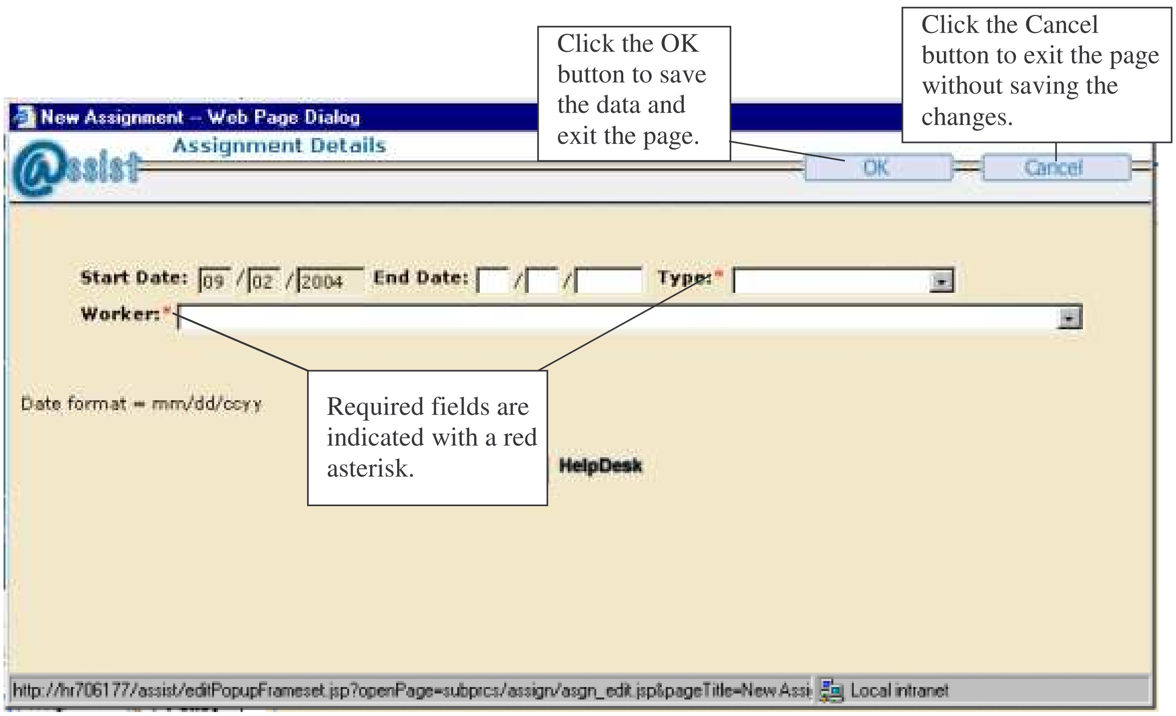
c. The Help button opens the ASSIST Help feature, which provides assistance in using ASSIST.

d. The Policy button provides a link to DHR's Policy Help for Adult or Family and Children Services.

e. The HelpDesk button allows you to send an email message to the ASSIST Help Desk.

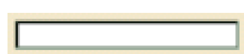


Data entry pages have fields into which you can enter information. Each field has a label so that you know what kind of information to enter. If a field is required (i.e., you must enter something in the field in order to save), there will be a red asterisk after the field name. Once you have completed entering the information on a Data Entry page, you can click the OK button to save your changes and exit the page, or click the Cancel button to exit the page without saving.

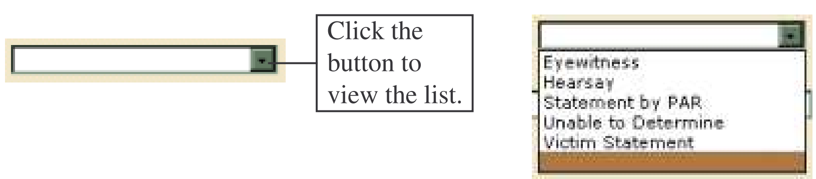


Data entry pages contain data entry fields that are used to collect information.

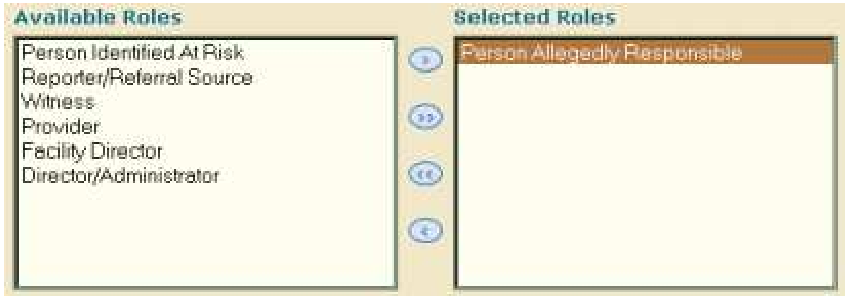
Text boxes allow you to type data in your own words.



Drop-down boxes allow you to select values from a list.



Multi-select boxes allow you to select more than one value from a list.



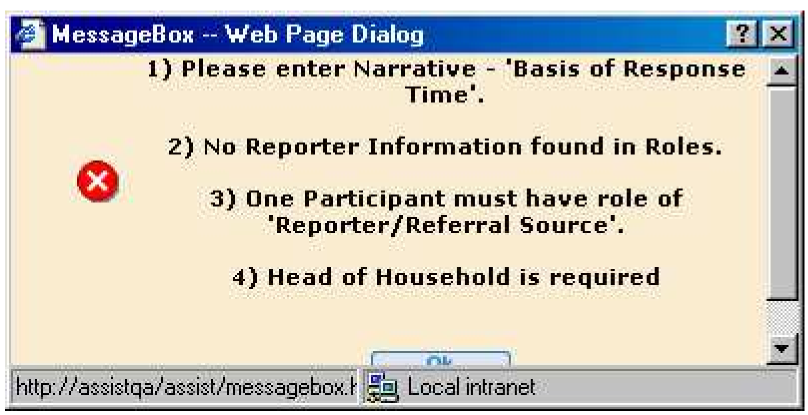
ASSIST Error Messages

ASSIST error messages are generated when there has been a data entry error or when there is not enough information available to complete a piece of work (e.g., you cannot approve an assessment/investigation until the Person Identified at Risk has been contacted). There are two methods used to notify you when an error has occurred.

When there has been a data entry error, like required data missing or invalid time format, a small box will display on your screen notifying you of the error, and the field(s) in error will be highlighted. Click the OK button on the message box to return to the page and correct the error(s).

When the error involves the system being unable to find valid information it needs to complete a function, a link will be displayed on the page with the words “Errors were found.”

You must click the “Errors were found” link to get a description of the items in error.



NOTE: You can print this list by holding the Ctrl key down while pressing P on the keyboard. When the Print dialog box opens, click the OK button.

Assignments

Purpose: Assignments control who can work on cases and allow supervisors to distribute work.

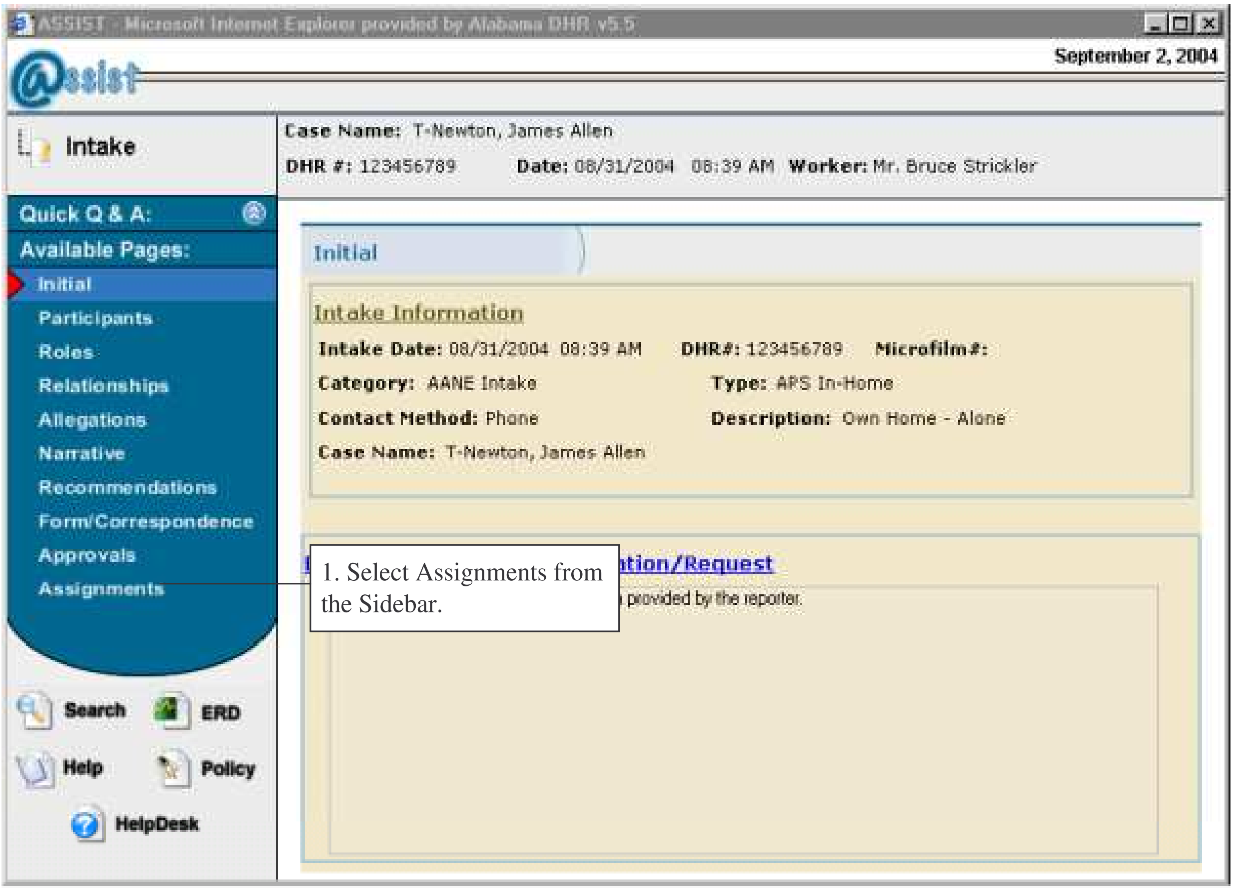
Overview: Intakes, Investigations, and Assessments are attached to workers using Assignments. An open case must have at least a Primary and a Supervisor assignment. A case can have several assignments in addition to the Primary and Supervisor assignments. Workers can assign INTAKES to anyone in their own county. Supervisors and Managers can assign and reassign intakes AND investigations/assessments to anyone in their county AND to Supervisors and Managers in other counties.

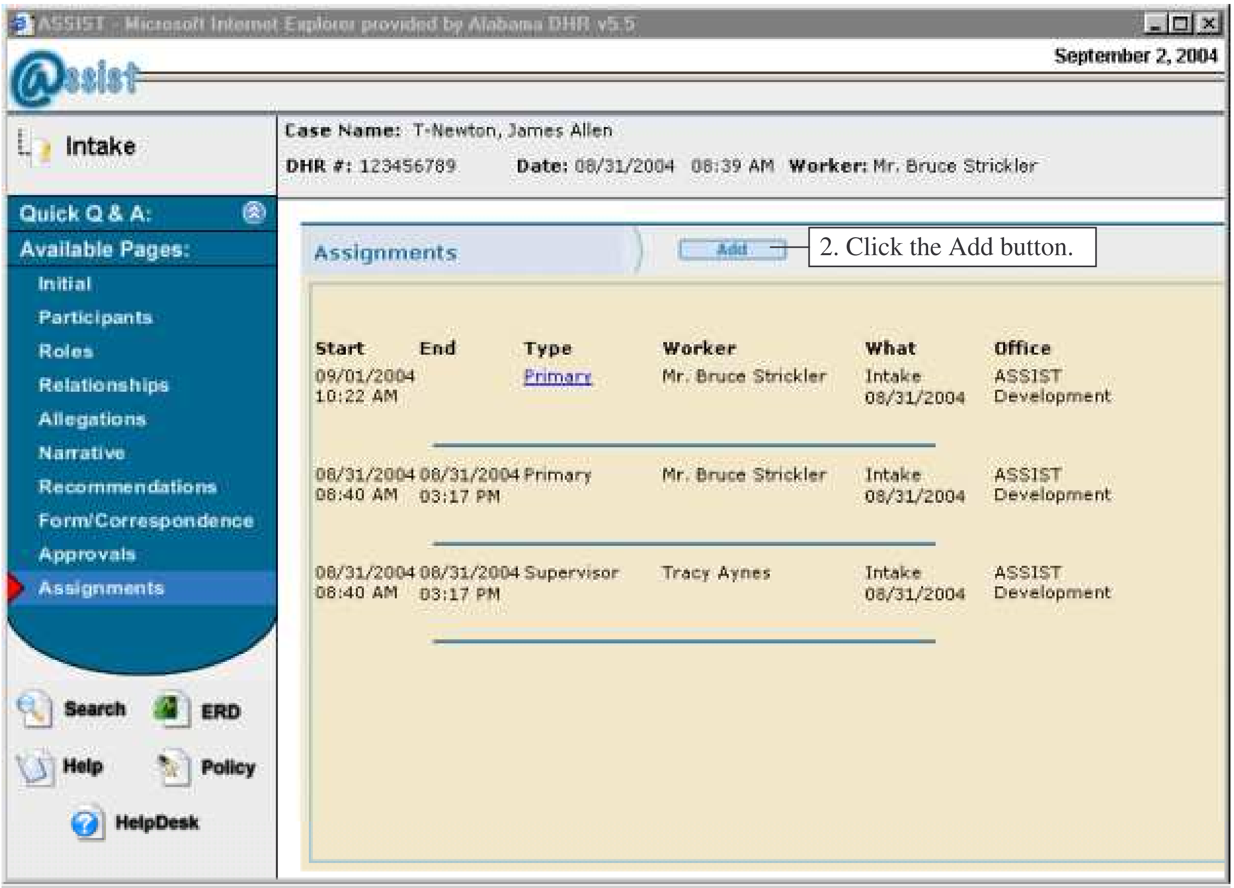
Creating a New Intake, Investigation, or Assessment Assignment

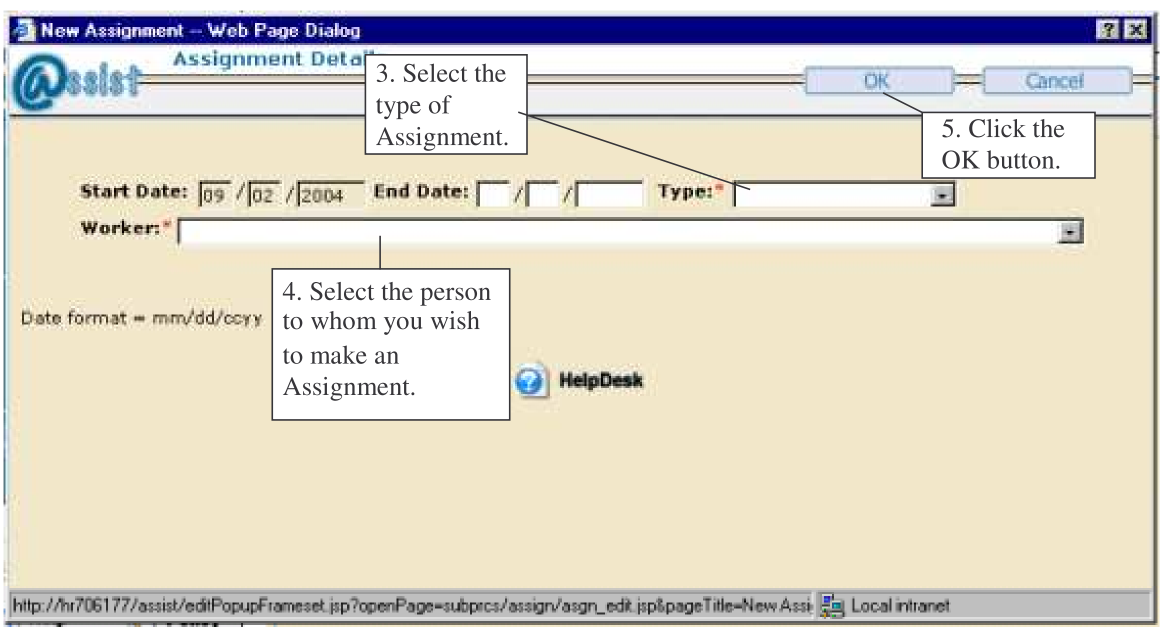
Intake, Assessment, and Investigation Assignments are maintained from the Assignments page within an intake, assessment, or investigation. This page is accessed from the Intake page, Assessments page, or Investigations page. To get to the Intake, Assessment, or Investigation page from the main ASSIST page, follow these steps:

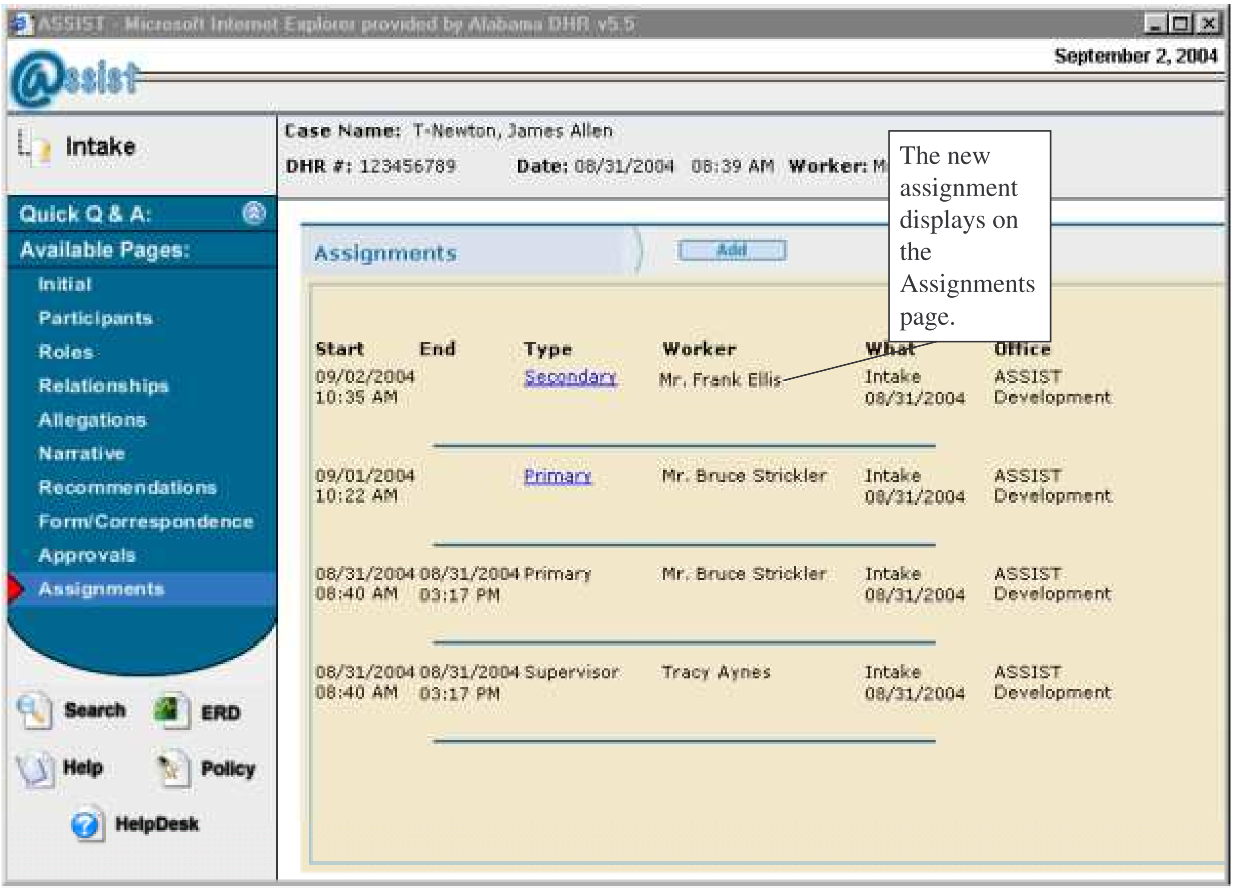
1. Select Summary from the ASSIST menu.
2. Select Intakes, Assessments, or Investigations from the Sidebar.
3. Click the name of the intake, assessment, or investigation you want to open.

You are now ready to open the Assignments page. This example involves an intake, but the steps are identical for assessments and investigations.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
September 2, 2004
Intake
Case Name: T-Newton, James Allen
DHR #: 123456789 Date: 08/31/2004 08:39 AM Worker: Mr. Bruce Strickler
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Initial
Intake Information
Intake Date: 08/31/2004 08:39 AM
DHR#: 123456789
Microfilm#:
Category: AANE Intake
Type: APS In-Home
Contact Method: Phone
Description: Own Home - Alone
Case Name: T-Newton, James Allen
1. Select Assignments from the Sidebar.
provided by the reporter.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
September 2, 2004
Intake
Case Name: T-Newton, James Allen
DHR #: 123456789 Date: 08/31/2004 08:39 AM Worker: Mr. Bruce Strickler
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Assignments
Add
2. Click the Add button.
Start End Type Worker What Office
09/01/2004 10:22 AM Primary Mr. Bruce Strickler Intake 08/31/2004 ASSIST Development
08/31/2004 08:40 AM 08/31/2004 03:17 PM Primary Mr. Bruce Strickler Intake 08/31/2004 ASSIST Development
08/31/2004 08:40 AM 08/31/2004 03:17 PM Supervisor Tracy Aynes Intake 08/31/2004 ASSIST Development


New Assignment -- Web Page Dialog
Assignment Detai
3. Select the type of Assignment.
OK
Cancel
5. Click the OK button.
Start Date: 09 / 02 / 2004 End Date: / / Type:*
Worker:*
4. Select the person to whom you wish to make an Assignment.
Date format = mm/dd/ccyy
HelpDesk
http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/assign/asgn_edit.jsp&pageTitle=New Assi
Local intranet



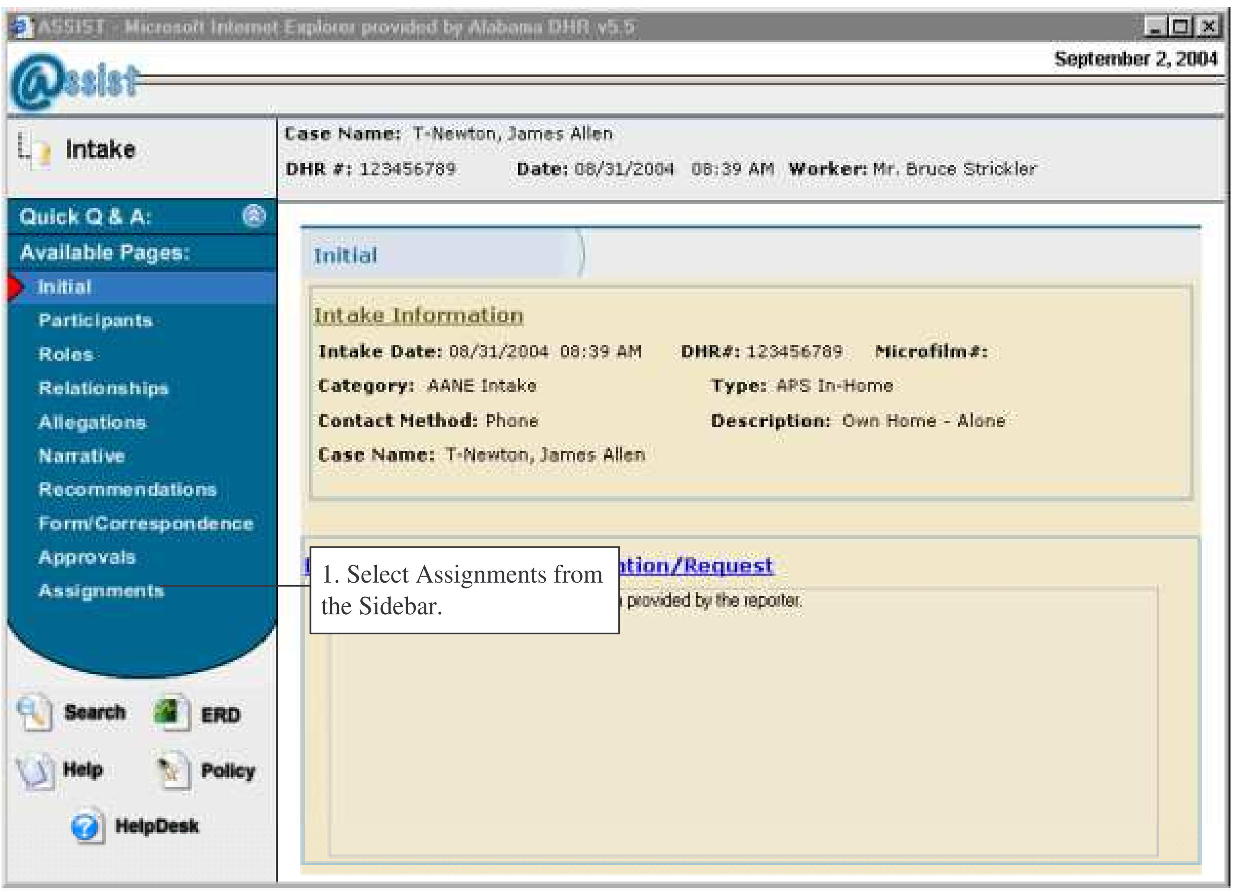
NOTE: When an intake, investigation, or assessment is assigned to someone, a supervisor assignment is created for everyone up their supervisory chain.

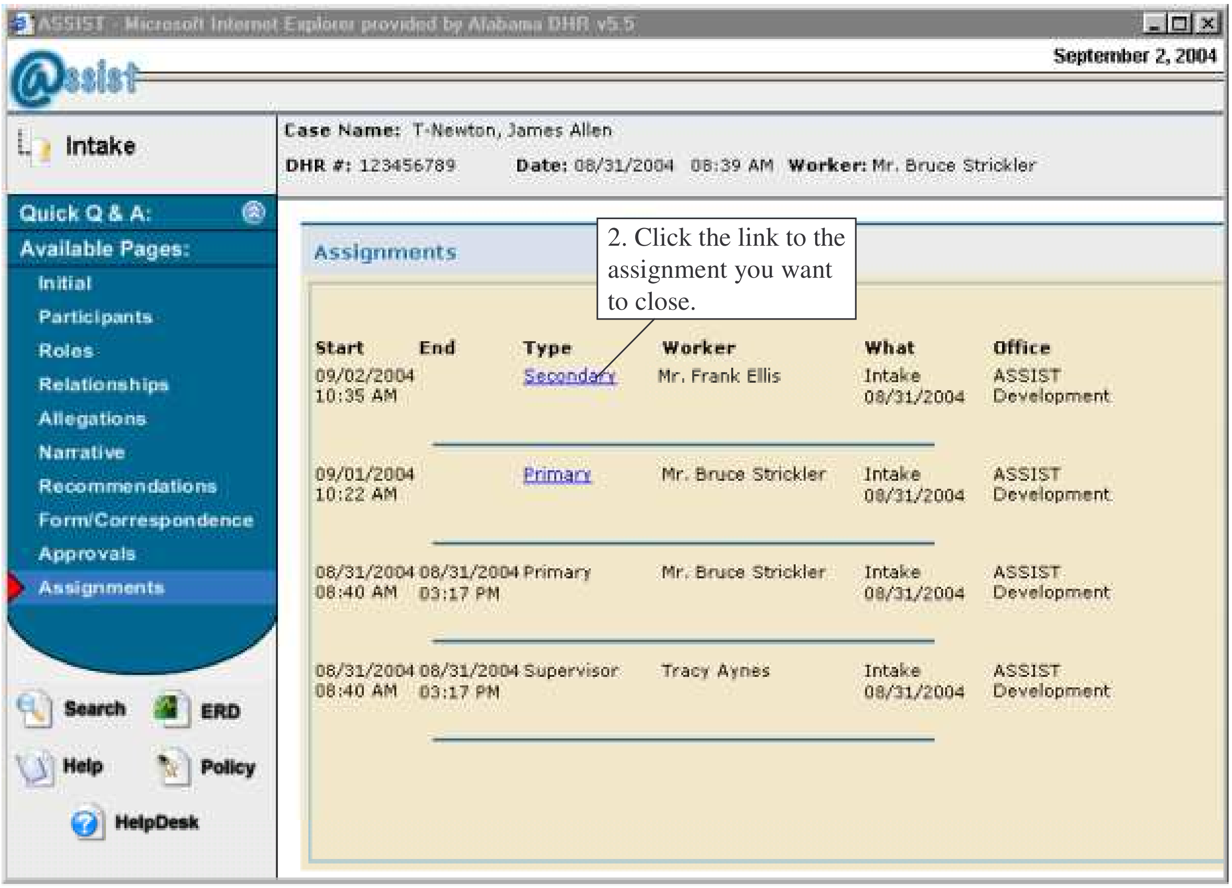
Closing an Intake, Investigation, or Assessment Assignment

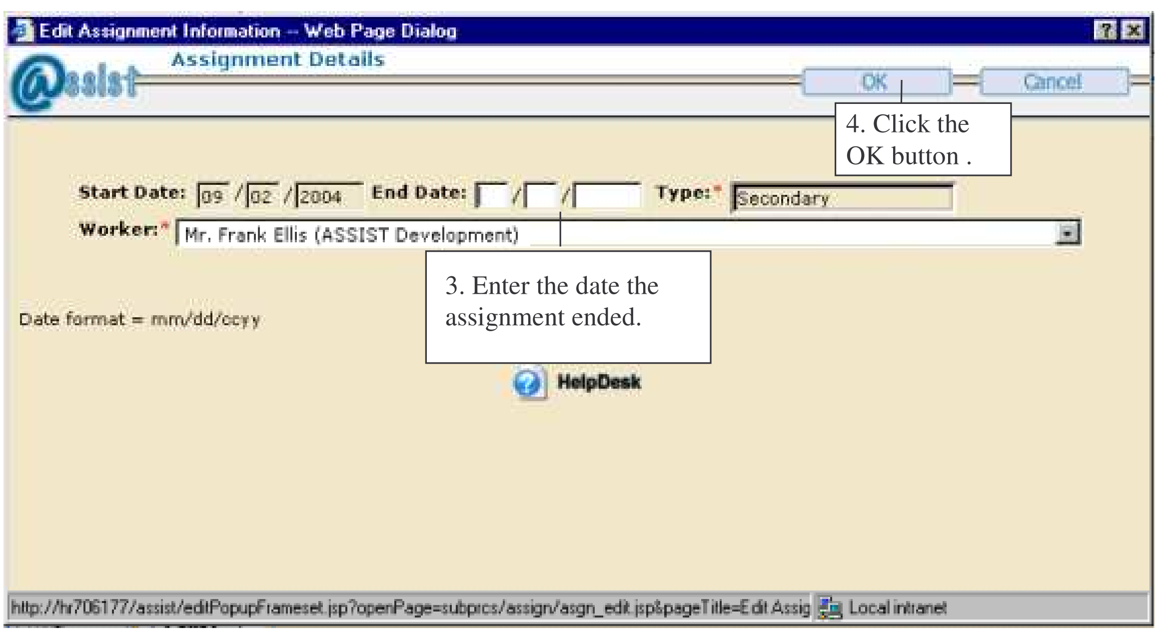
Intake, Assessment, and Investigation Assignments are maintained from the Assignments page within an intake, assessment, or investigation. This page is accessed from the Intake page, Assessments page, or Investigations page. To get to the Intake, Assessment, or Investigation page from the main ASSIST page, follow these steps:

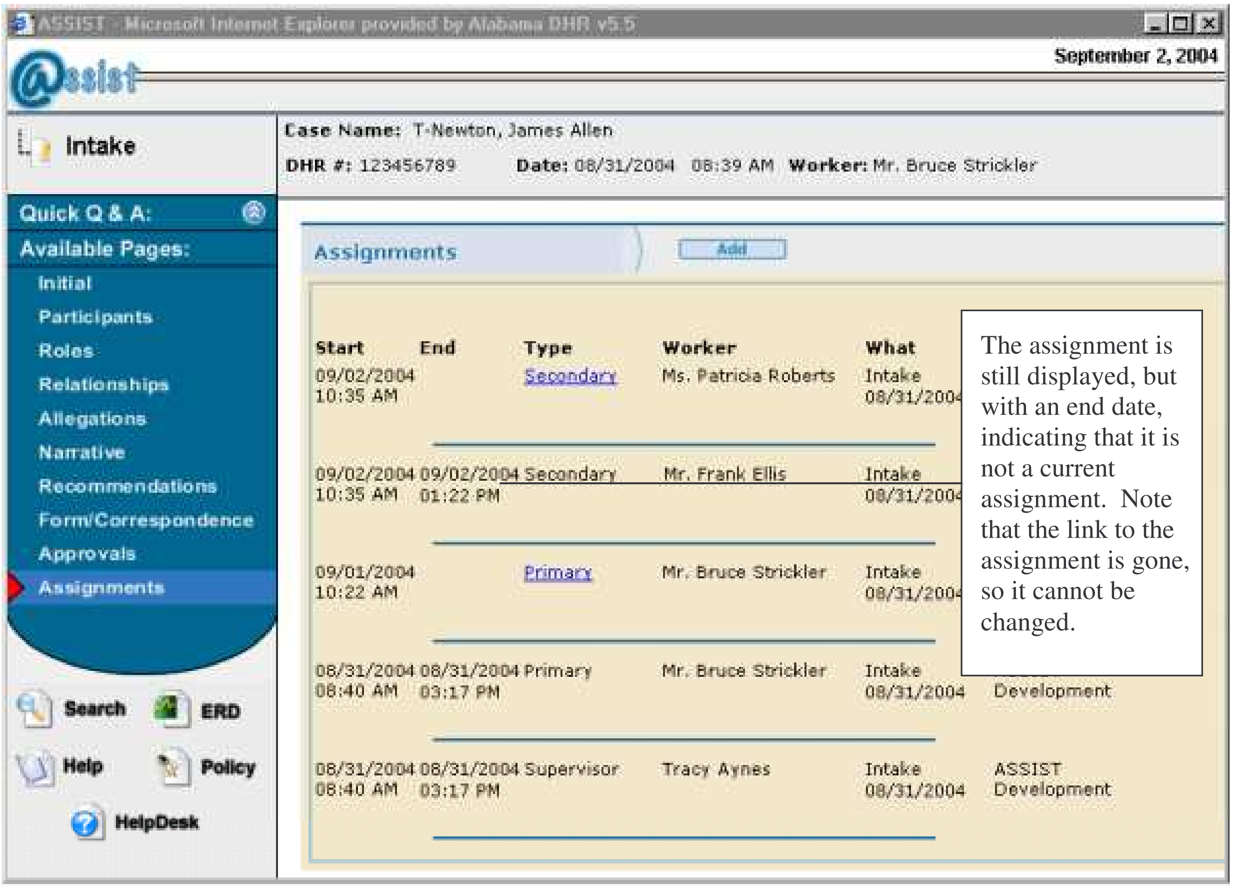
1. Select Summary from the ASSIST menu.
2. Select Intakes, Assessments, or Investigations from the Sidebar.
3. Click the name of the intake, assessment, or investigation you want to open.

You are now ready to open the Assignments page. This example involves an intake, but the steps are identical for assessments and investigations.




ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
September 2, 2004
Intake
Case Name: T-Newton, James Allen
DHR #: 123456789 Date: 08/31/2004 08:39 AM Worker: Mr. Bruce Strickler
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Assignments
2. Click the link to the assignment you want to close.
Start End Type Worker What Office
09/02/2004 10:35 AM Secondary Mr. Frank Ellis Intake 08/31/2004 ASSIST Development
09/01/2004 10:22 AM Primary Mr. Bruce Strickler Intake 08/31/2004 ASSIST Development
08/31/2004 08:40 AM 08/31/2004 03:17 PM Primary Mr. Bruce Strickler Intake 08/31/2004 ASSIST Development
08/31/2004 08:40 AM 08/31/2004 03:17 PM Supervisor Tracy Aynes Intake 08/31/2004 ASSIST Development


Edit Assignment Information -- Web Page Dialog
Assignment Details
OK
Cancel
4. Click the OK button .
Start Date: 09 / 02 / 2004 End Date: / / Type:* Secondary
Worker:* Mr. Frank Ellis (ASSIST Development)
3. Enter the date the assignment ended.
Date format = mm/dd/ccyy
HelpDesk
http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/assign/asgn_edit.jsp&pageTitle=Edit Assig
Local intranet



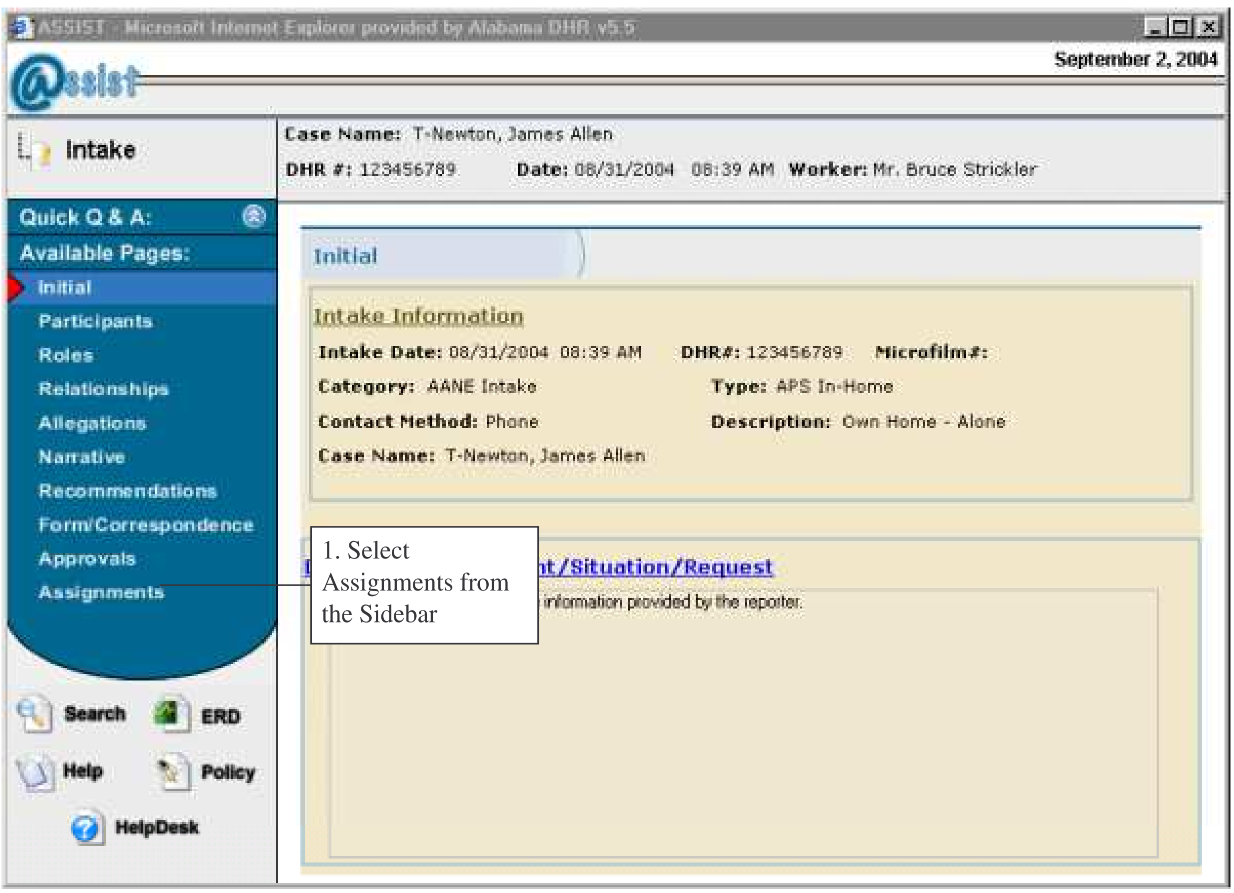
The assignment is still displayed, but with an end date, indicating that it is not a current assignment. Note that the link to the assignment is gone, so it cannot be changed.

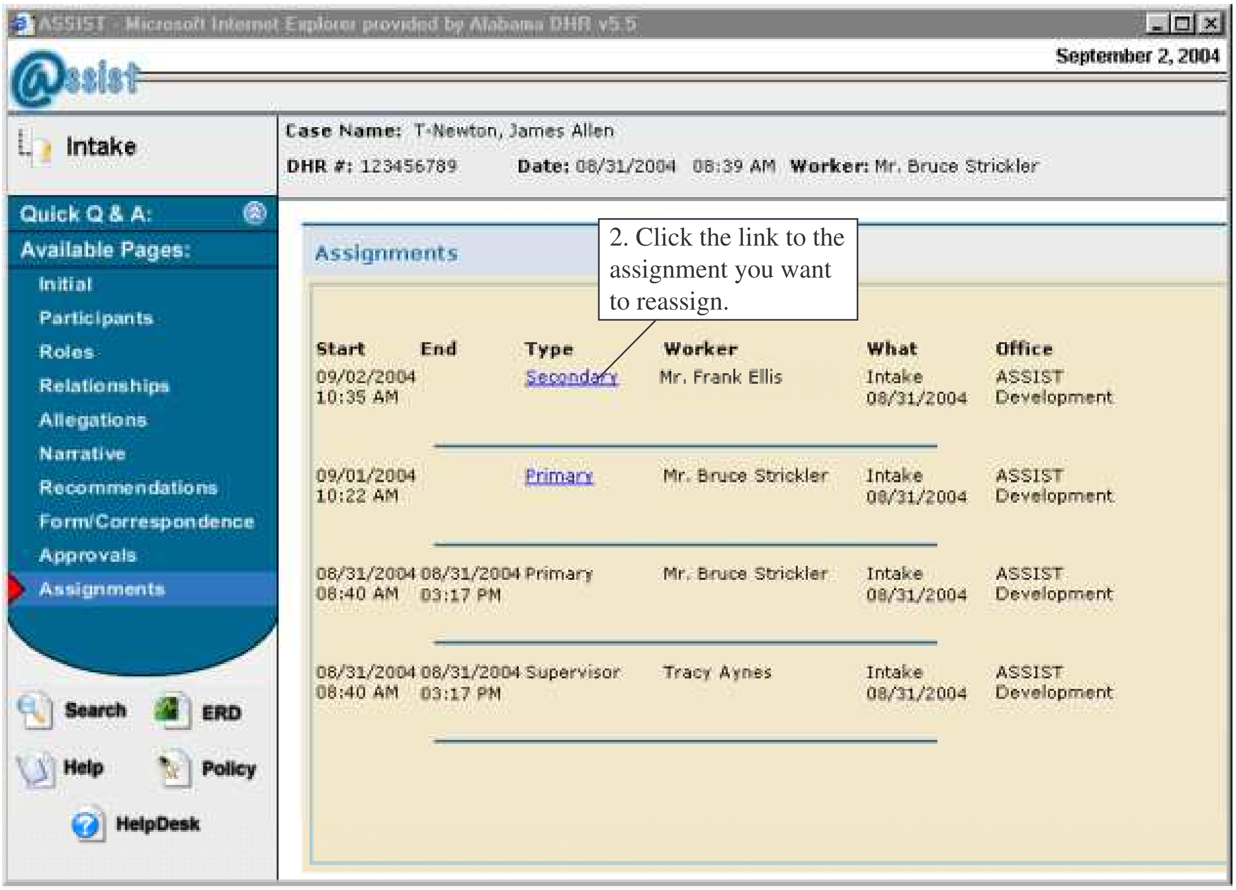
Reassigning an Individual Intake, Investigation, or Assessment

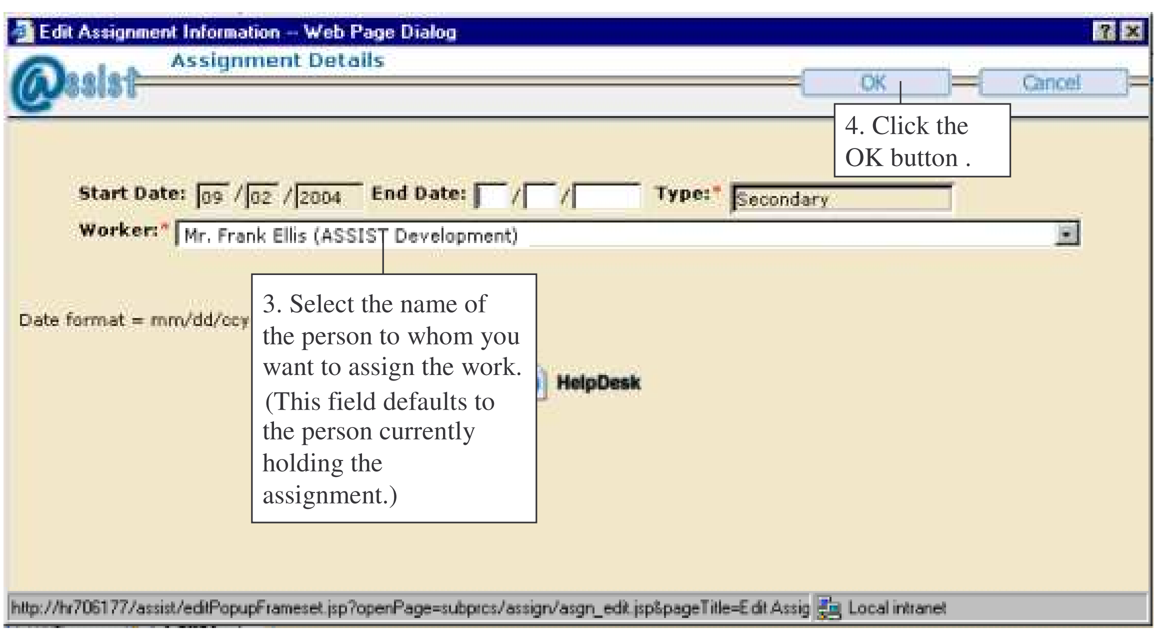
Individual Intake, Assessment, and Investigation Assignments are maintained from the Assignments page within an intake, assessment or investigation. This page is accessed from the Intake page, Assessment page, or Investigation page. Supervisors and Managers can reassign multiple intakes, assessments, or investigations at a time using the Re-Assignments page (see Reassigning Multiple Intakes, Investigations, or Assessments on page 29). To get to the Intakes, Assessments, or Investigations page from the main ASSIST page, follow these steps:

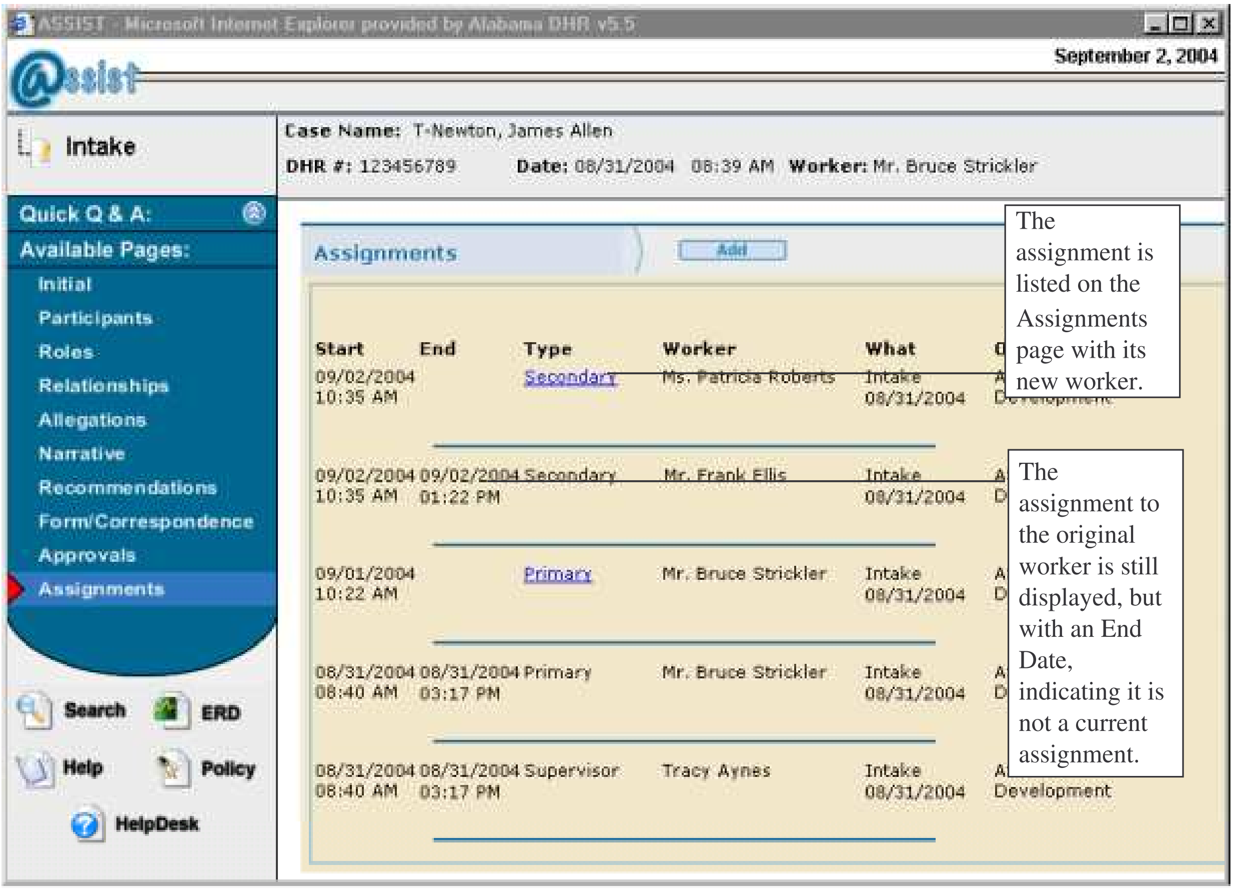
1. Select Summary from the ASSIST menu.
2. Select Intakes, Assessments, or Investigations from the Sidebar.
3. Click the name of the intake, assessment, or investigation you want to open.

You are now ready to open the Assignments page. This example involves an intake, but the steps are identical for assessments and investigations.



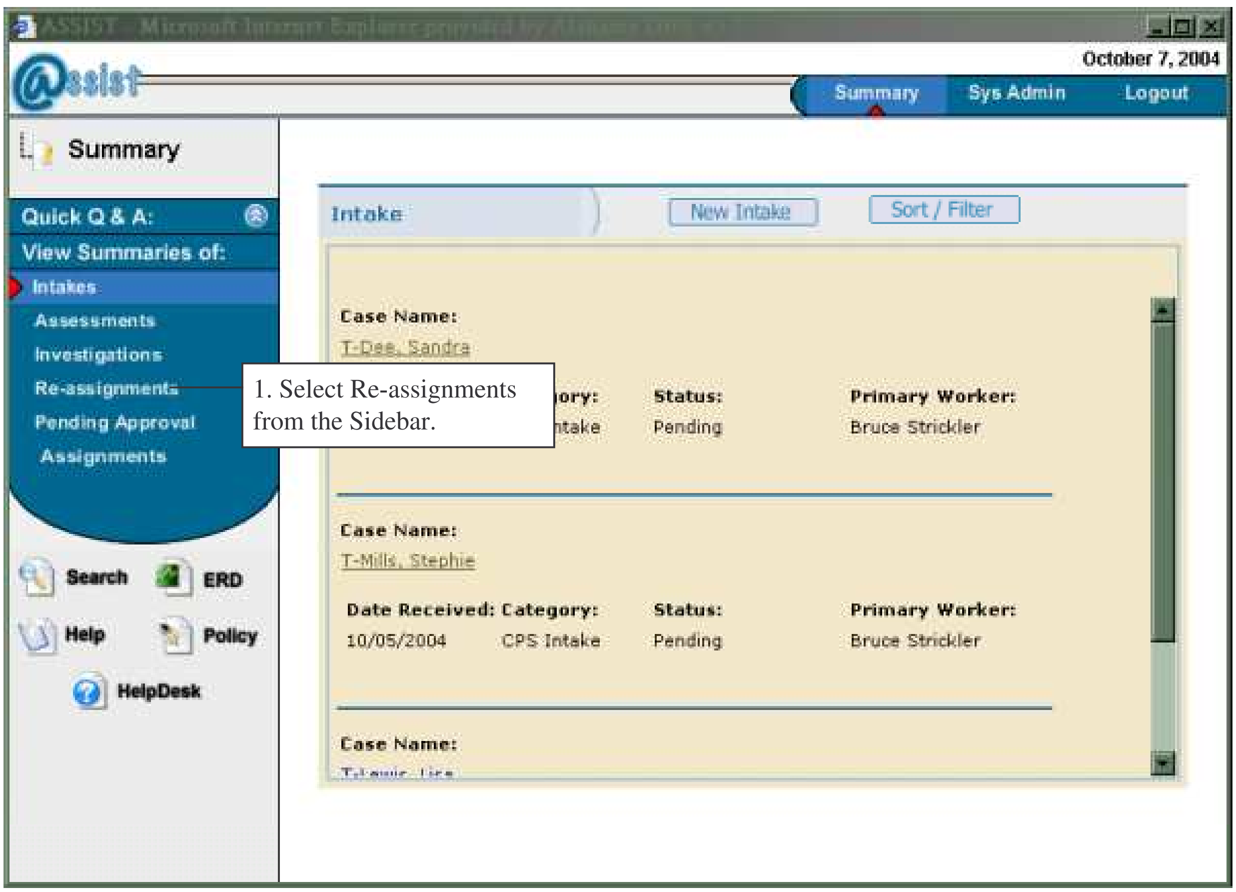

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
September 2, 2004
Intake
Case Name: T-Newton, James Allen
DHR #: 123456789 Date: 08/31/2004 08:39 AM Worker: Mr. Bruce Strickler
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Assignments
2. Click the link to the assignment you want to reassign.
Start End Type Worker What Office
09/02/2004 10:35 AM Secondary Mr. Frank Ellis Intake 08/31/2004 ASSIST Development
09/01/2004 10:22 AM Primary Mr. Bruce Strickler Intake 08/31/2004 ASSIST Development
08/31/2004 08:40 AM 08/31/2004 03:17 PM Primary Mr. Bruce Strickler Intake 08/31/2004 ASSIST Development
08/31/2004 08:40 AM 08/31/2004 03:17 PM Supervisor Tracy Aynes Intake 08/31/2004 ASSIST Development

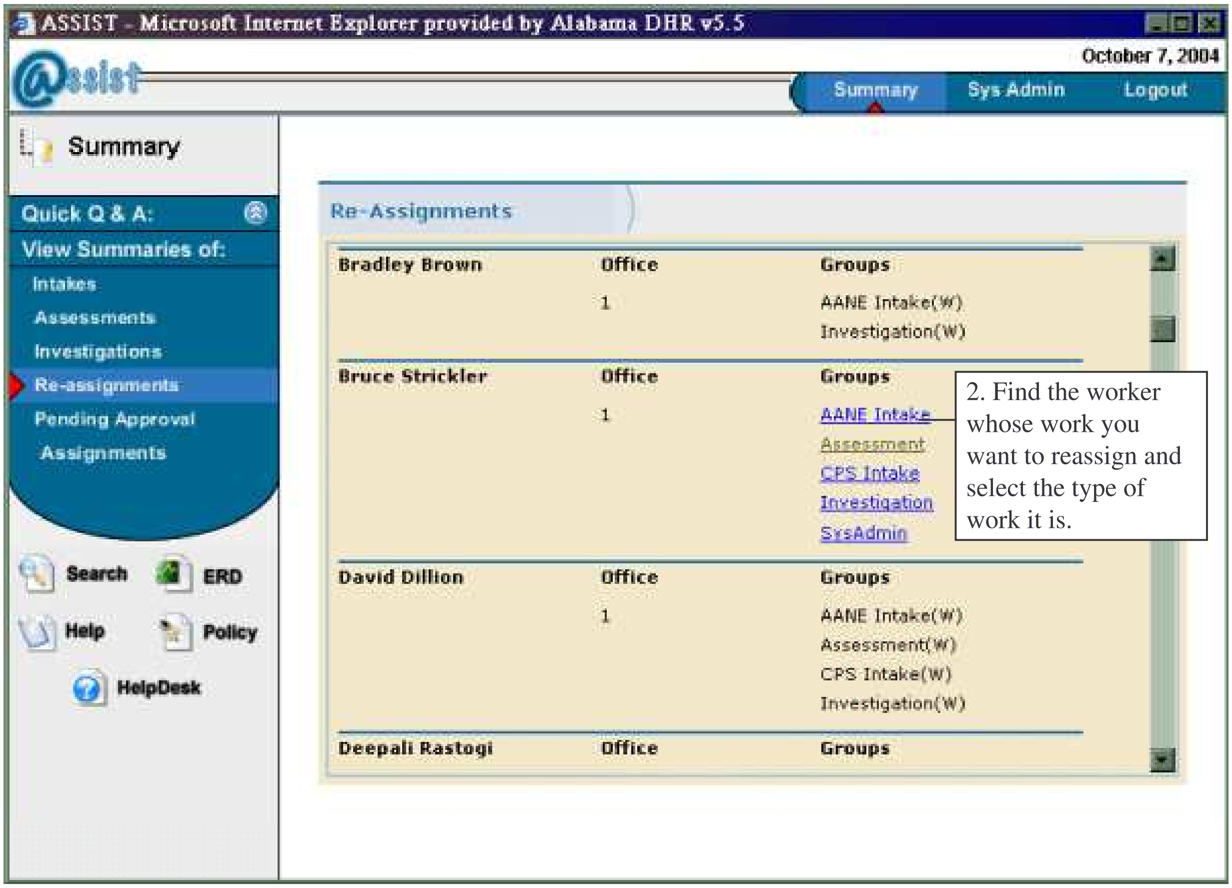

Edit Assignment Information -- Web Page Dialog
Assignment Details
OK
Cancel
4. Click the OK button .
Start Date: 09 / 02 / 2004 End Date: / / Type:* Secondary
Worker:* Mr. Frank Ellis (ASSIST Development)
Date format = mm/dd/ccy
3. Select the name of the person to whom you want to assign the work. (This field defaults to the person currently holding the assignment.)
HelpDesk
http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/assign/asgn_edit.jsp&pageTitle=Edit Assig
Local intranet

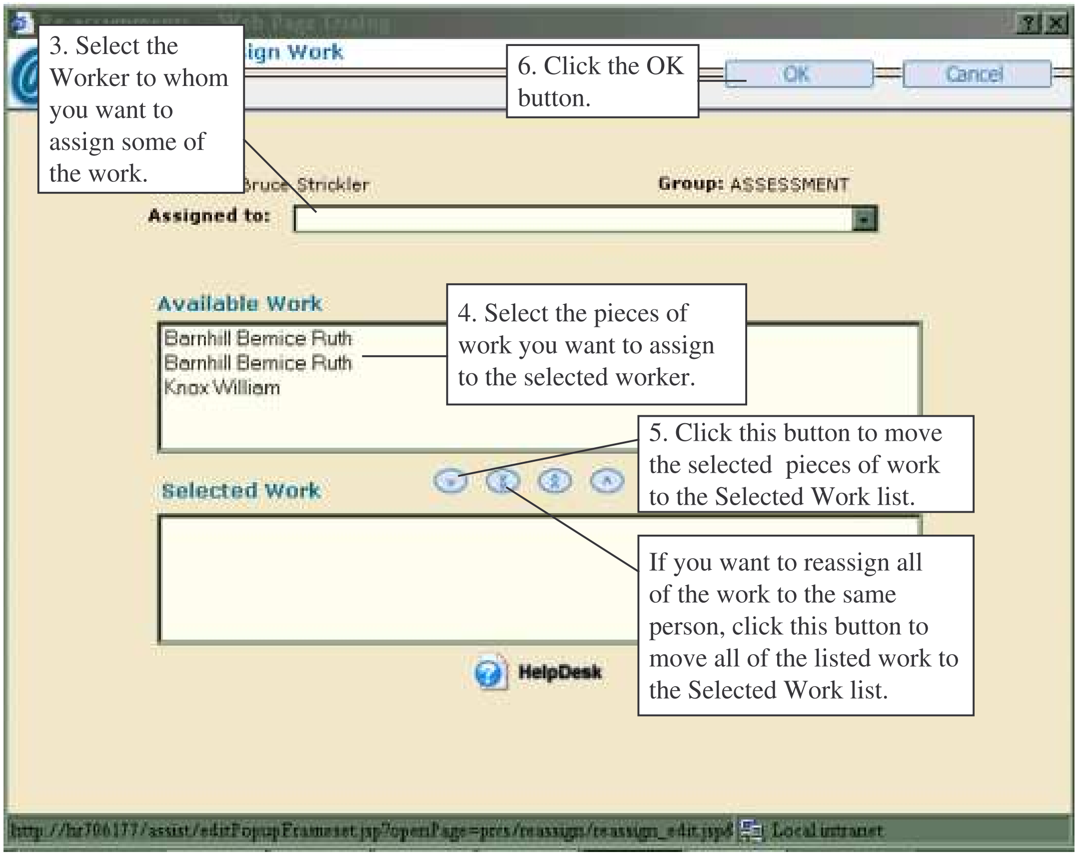

ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
September 2, 2004
Intake
Case Name: T-Newton, James Allen
DHR #: 123456789 Date: 08/31/2004 08:39 AM Worker: Mr. Bruce Strickler
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Assignments
Add
Start End Type Worker What
09/02/2004 10:35 AM Secondary Ms. Patricia Roberts Intake 08/31/2004
09/02/2004 10:35 AM 09/02/2004 01:22 PM Secondary Mr. Frank Ellis Intake 08/31/2004
09/01/2004 10:22 AM Primary Mr. Bruce Strickler Intake 08/31/2004
08/31/2004 08:40 AM 08/31/2004 03:17 PM Primary Mr. Bruce Strickler Intake 08/31/2004
08/31/2004 08:40 AM 08/31/2004 03:17 PM Supervisor Tracy Aynes Intake 08/31/2004 Development
The assignment is listed on the Assignments page with its new worker.
The assignment to the original worker is still displayed, but with an End Date, indicating it is not a current assignment.

Reassigning Multiple Intakes, Investigations, or Assessments

If you are a supervisor, there may be times when you need to redistribute a worker's intakes, investigations, and assessments. Doing this could take a long time if you reassign each piece of work individually. There is a faster way to reassign the work if you want to reassign multiple pieces of work to the same worker. This is done from the Re-assignments page. This page provides the means to reassign all or part of a worker's intakes, investigations, or assessments to another worker. For example, you could redistribute one worker's 12 assessments among four other workers by making four re-assignments (about three per worker) rather than opening each of the 12 assessments and using the Assignment page to reassign them individually. To open the Re-assignments page from the ASSIST Summary page:

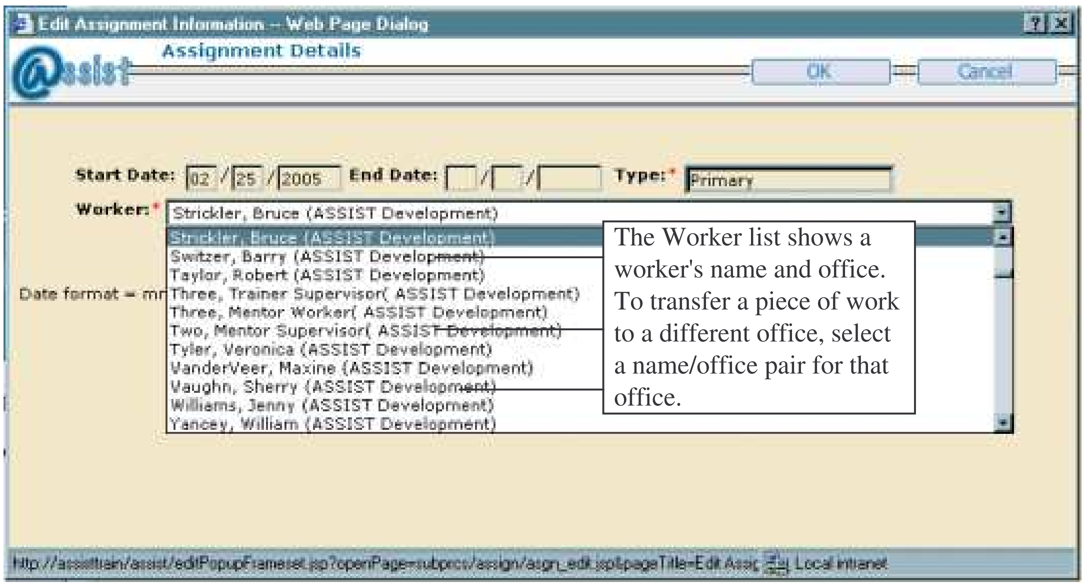



ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
October 7, 2004
Summary
Sys Admin
Logout
Summary
Quick Q & A:
View Summaries of:
Intakes
Assessments
Investigations
Re-assignments
Pending Approval
Assignments
Search
ERD
Help
Policy
HelpDesk
Re-Assignments
Bradley Brown
Office
Groups
1
AANE Intake(W)
Investigation(W)
Bruce Strickler
Office
Groups
1
AANE Intake
Assessment
CPS Intake
Investigation
SysAdmin
David Dillion
Office
Groups
1
AANE Intake(W)
Assessment(W)
CPS Intake(W)
Investigation(W)
Deepali Rastogi
Office
Groups
2. Find the worker whose work you want to reassign and select the type of work it is.


3. Select the Worker to whom you want to assign some of the work.
ign Work
6. Click the OK button.
OK
Cancel
Bruce Strickler
Group: ASSESSMENT
Assigned to:
Available Work
Barnhill Bernice Ruth
Barnhill Bernice Ruth
Knox William
4. Select the pieces of work you want to assign to the selected worker.
5. Click this button to move the selected pieces of work to the Selected Work list.
Selected Work
If you want to reassign all of the work to the same person, click this button to move all of the listed work to the Selected Work list.
HelpDesk
Local intranet

Assigning/Reassigning Work to Another County

There will be times when you will need to transfer work to another county. Supervisors and managers have the capability to reassign intakes, investigations, and assignments to other counties. This is done the exact same way as an individual reassignment within the county, except you (as a supervisor or manager) will be able to see supervisors and managers from other counties in the Worker list on the Assignment Details page. To transfer a piece of work to another county, you need to transfer the PRIMARY assignment to a supervisor or manager in that county.



NOTE: Workers only see people in their office on this list. For supervisors and managers, the people are grouped by office. Your office appears at the top of the list followed by the rest of the offices in alphabetical order. Within each office, people are grouped alphabetically by last name.

Searches

Purpose: The purpose of Searches is to allow you to find people and cases that have been entered into the ASSIST database.

Overview: There are two types of searches in ASSIST: Required Searches and On-Demand Searches.

Required searches are performed when you are verifying participants in an intake or case. These searches are extremely important. They help prevent having more than one record for a person or family.

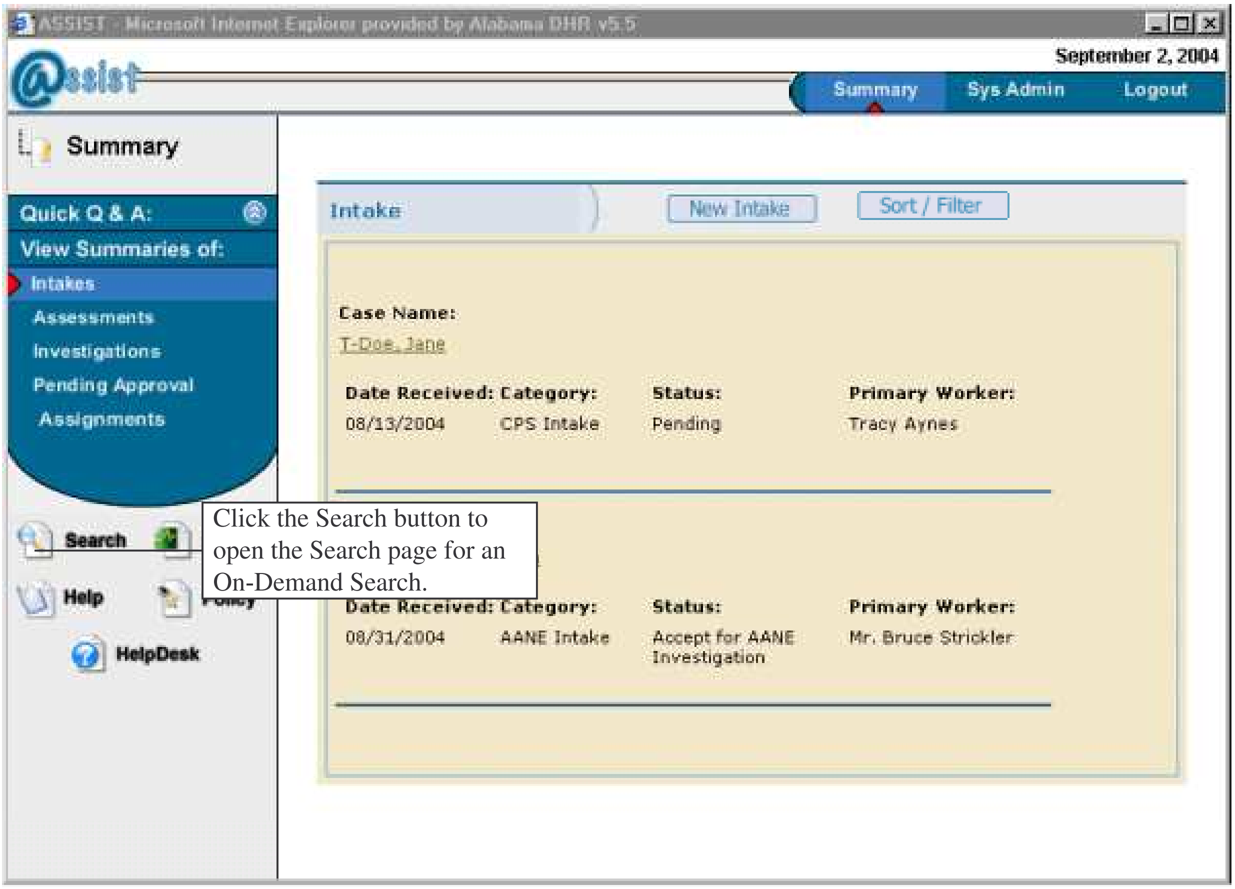
On-Demand Searches are searches that you can conduct at any time.

Opening the Search Page

Prior to completing an assessment or investigation, you must search for all of the participants to see if they are already in the ASSIST database. To do this, you must click the “Verified” link beside the participant name. This will start a search by name for the participant. This search can be done in the intake or in the assessment/investigation.

When a supervisor accepts an intake for assessment or investigation, a Case Search is automatically initiated and the case is searched for by name.

For On-Demand Searches, you need to click the Search button located below the Sidebar.



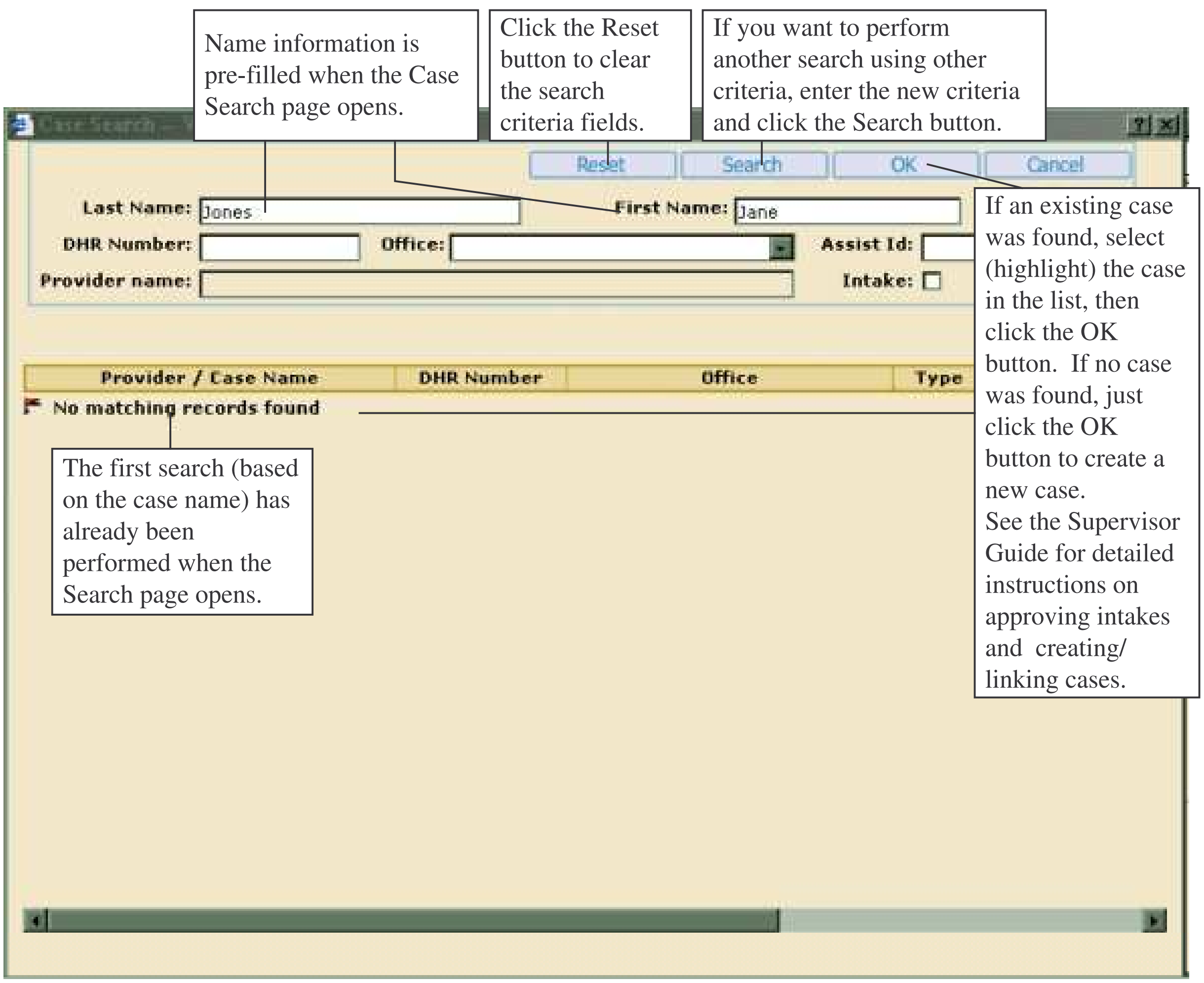
Case Searches

Required Case Searches

Purpose: Required Case Searches allow you to determine if a case record already exists for a person or family.

Overview: If you have a new intake and find that a case already exists for the person or family**, you do not want to create a new case**! You want to create a link between the new intake and the existing case. This is done by selecting (highlighting) the existing case on the Search page and clicking the OK button.

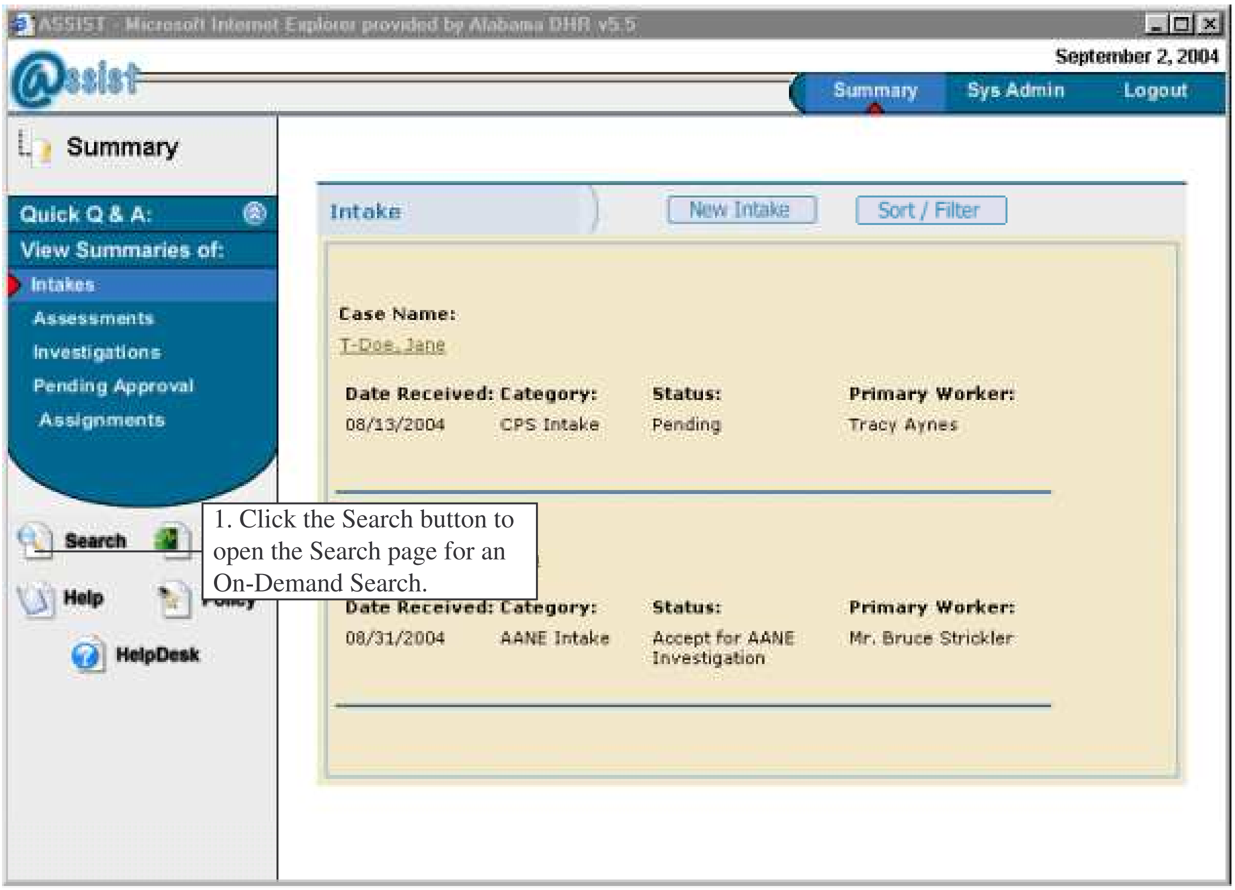
The Search page will open automatically when you approve an intake. An initial search will already have been performed based on just the case name. The results of this search are displayed when the Search page opens.

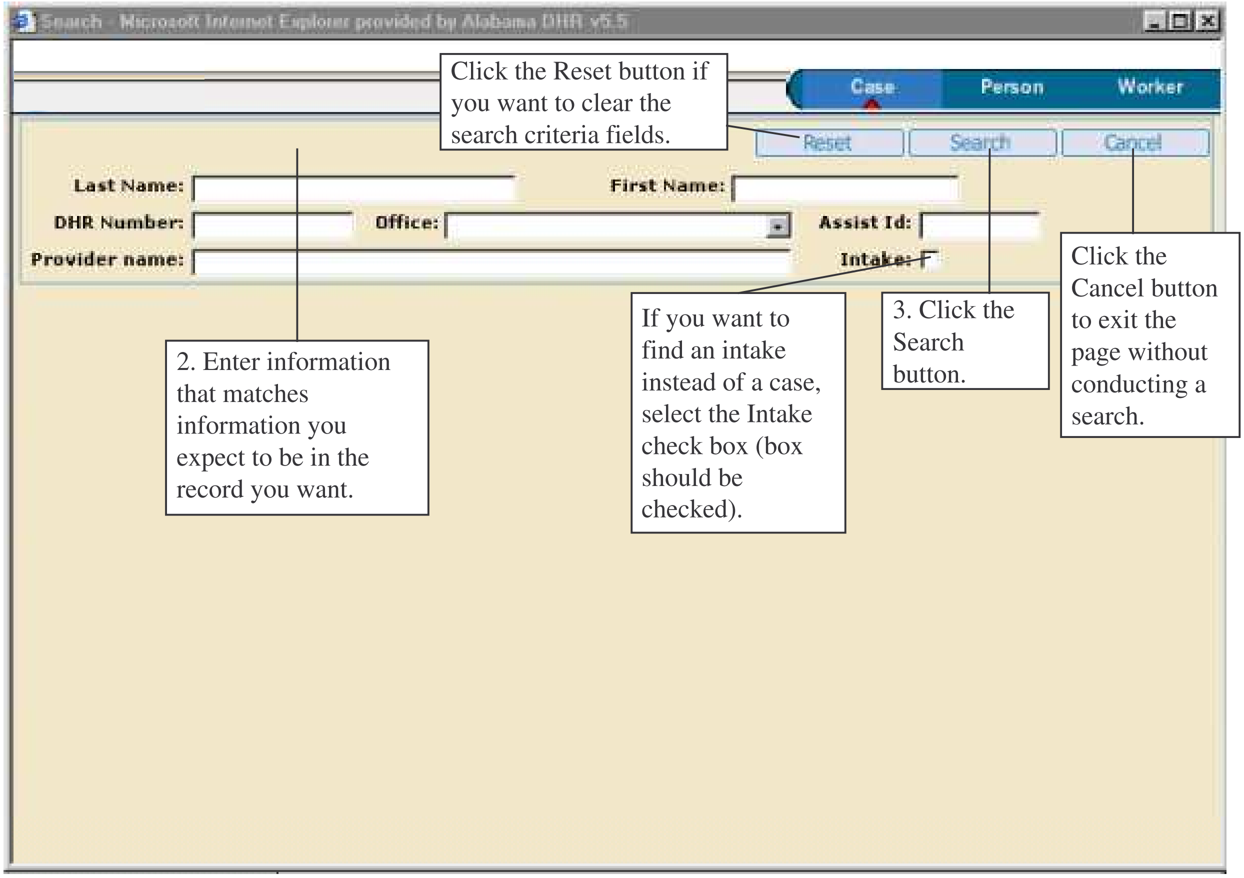


On-Demand Case Searches

Purpose: On-Demand Searches allow you to search for specific people or cases in the ASSIST database any time the need arises.

Overview: On-Demand Case Searches are available through the Search button located at the bottom of the Sidebar.





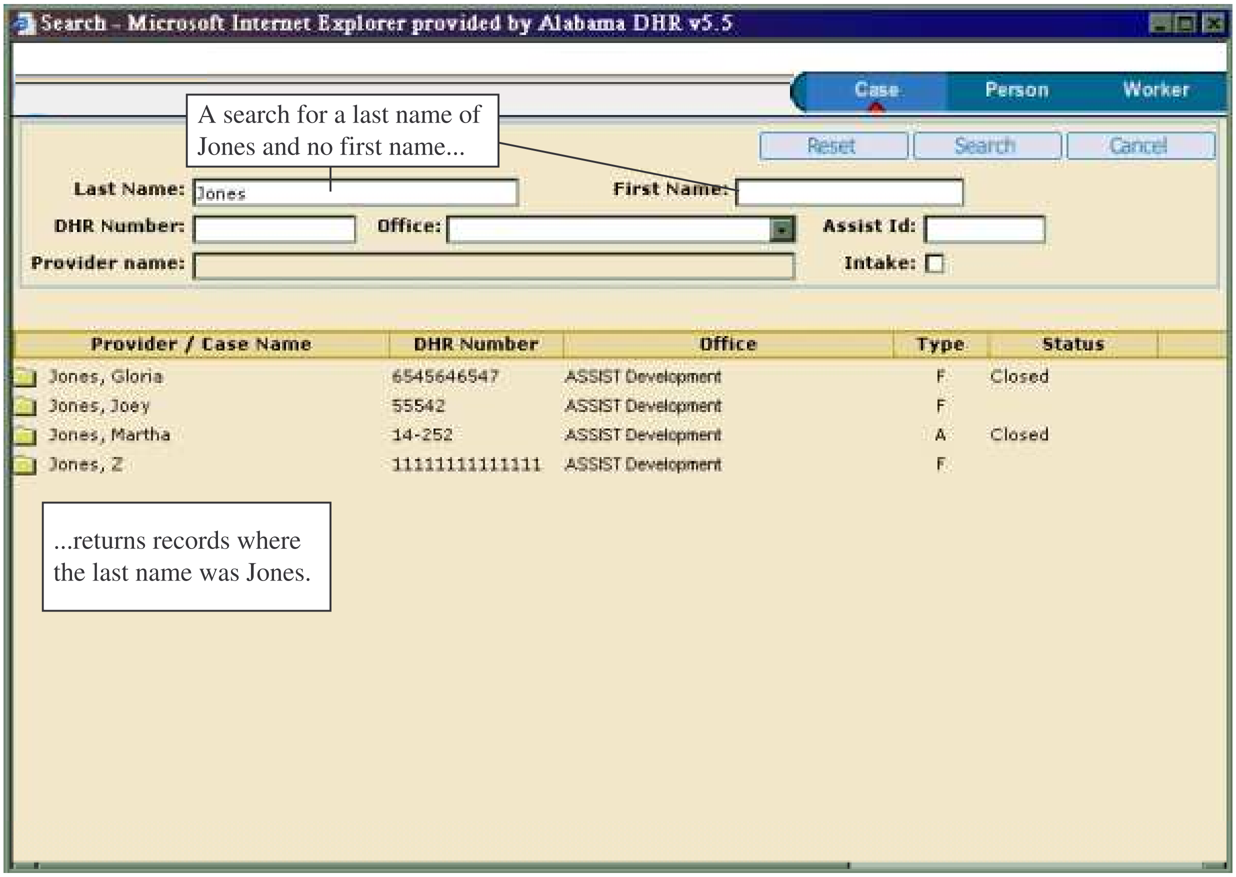
SEARCH TIP: If you know the DHR Number or the ASSIST ID for the case you want, use those instead of the name fields. This will return only the case you want, where using names can be expected to return a larger number of records which you will have to eliminate one-by-one.

SEARCH TIP: When you enter a Provider Name, the search returns a list of case names containing any of the words from the Provider Name.

SEARCH TIP: If you only want to search for cases in a specific county, Select the county from the Office drop-down list.

SEARCH TIP: If you want to try a search based on part of a name, you can use the * as a "wildcard" to replace part of the name. For example: a search for a last name of Jon* and first name of Jane would return any case where the first name was Jane and the last name that starts with Jon.

Here is an example of case search results.



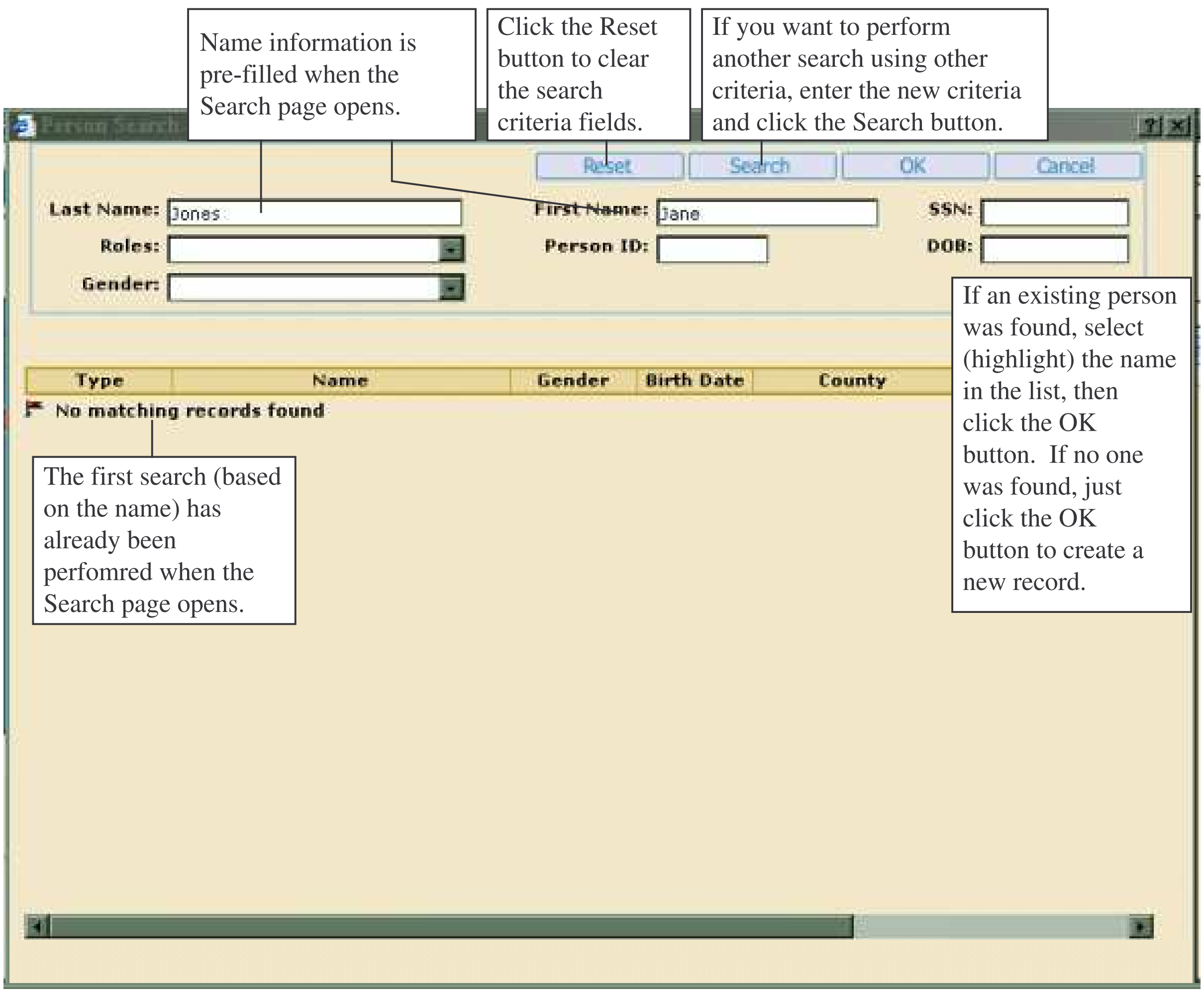
Person Searches

Required Person Searches

Purpose: Required Person Searches allow you to determine if a person you are about to add to the database is already in there.

Overview: If you are verifying a person (see Verifying Participants in the CPS or APS user guide) and find that they are already in the database**, you do not want to add them again**! You want to create a link between the person in the intake, assessment or investigation and the already existing person. This is done by selecting (highlighting) the existing person on the Search page and clicking the OK button.

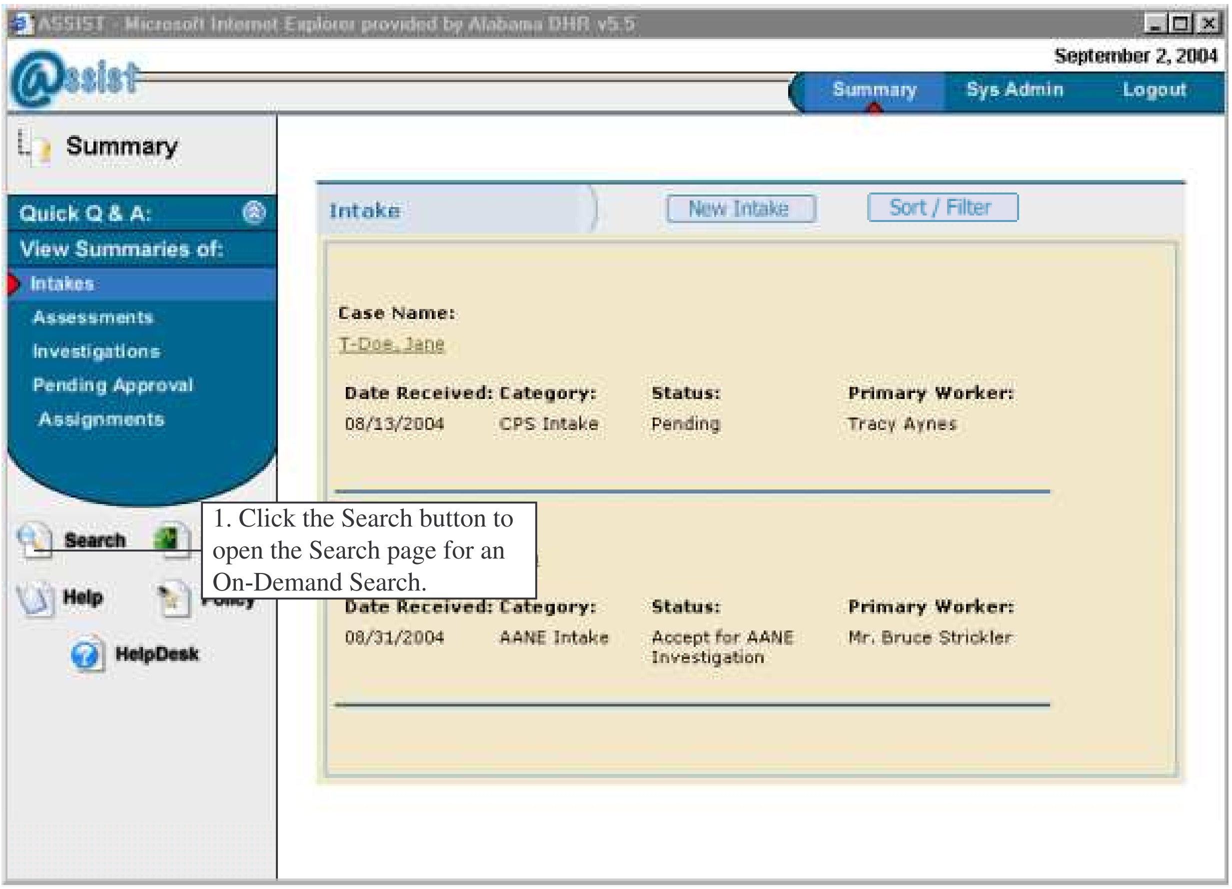
The Search page will open when you click "Verified" by a participant's name. An initial search will already have been performed based on the participant's name. The results of this search are displayed when the Search page opens.

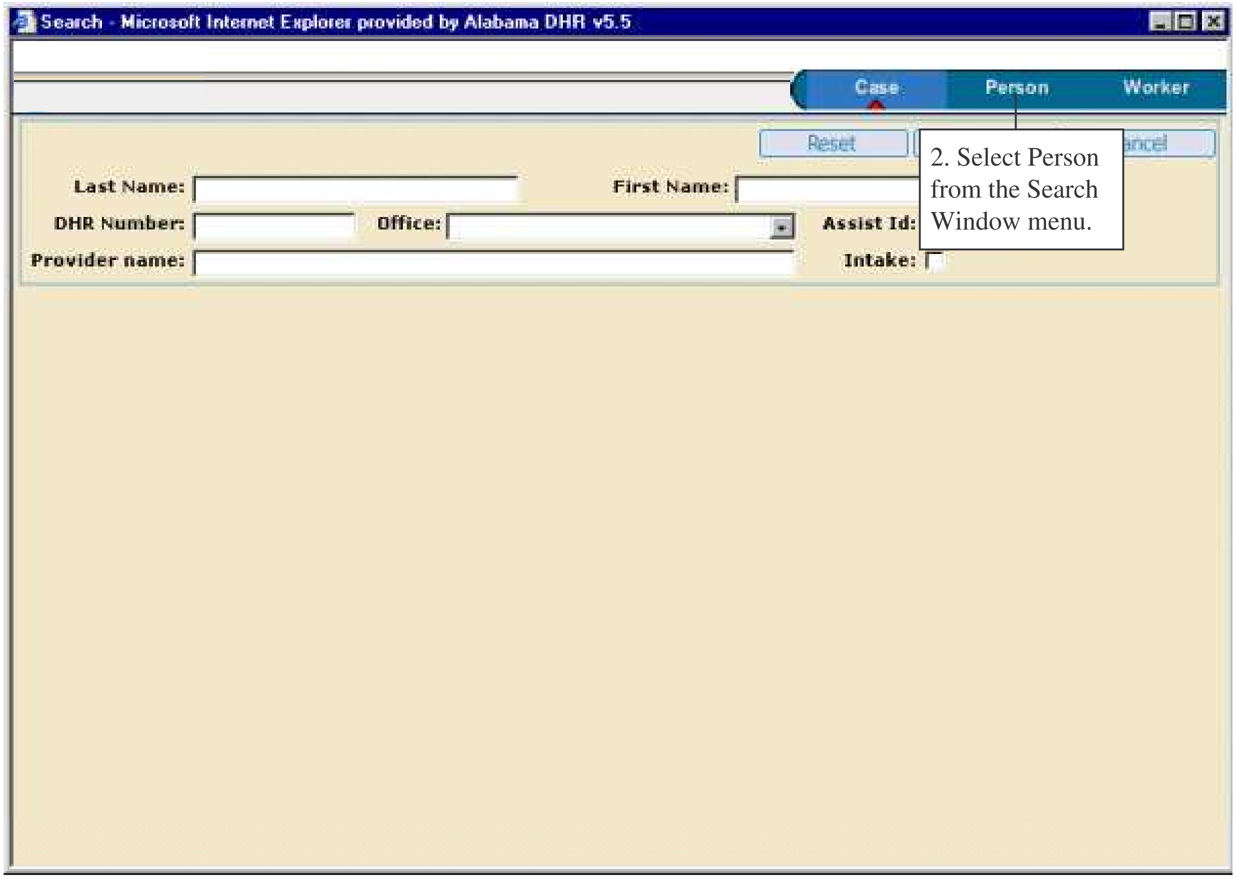


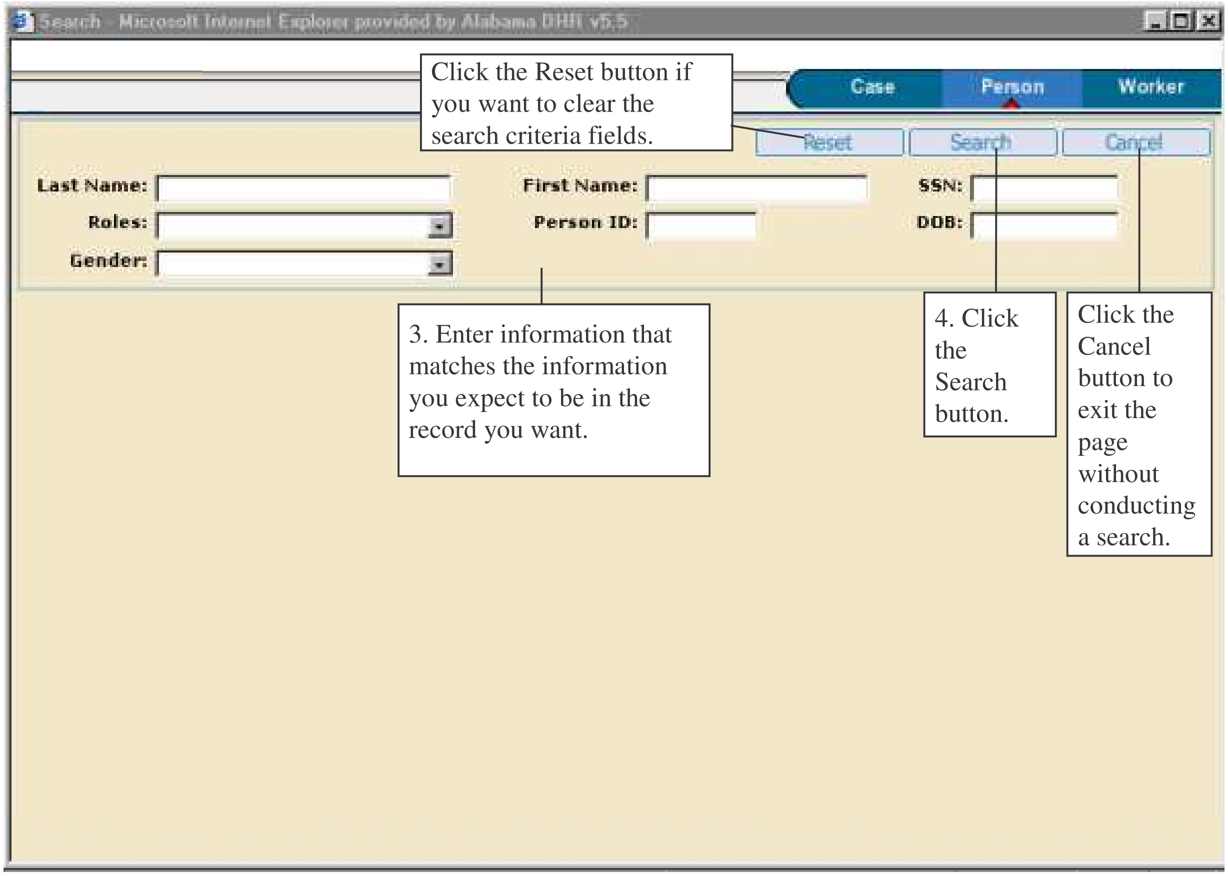
On Demand Person Searches

Purpose: On-Demand Searches allow you to search for specific people or cases in the ASSIST database any time the need arises.

Overview: On-Demand Person Searches are available through the Search button located at the bottom of the Sidebar.




Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
Case
Person
Worker
Reset
ancel
2. Select Person from the Search Window menu.
Last Name:
First Name:
DHR Number:
Office:
Assist Id:
Provider name:
Intake:



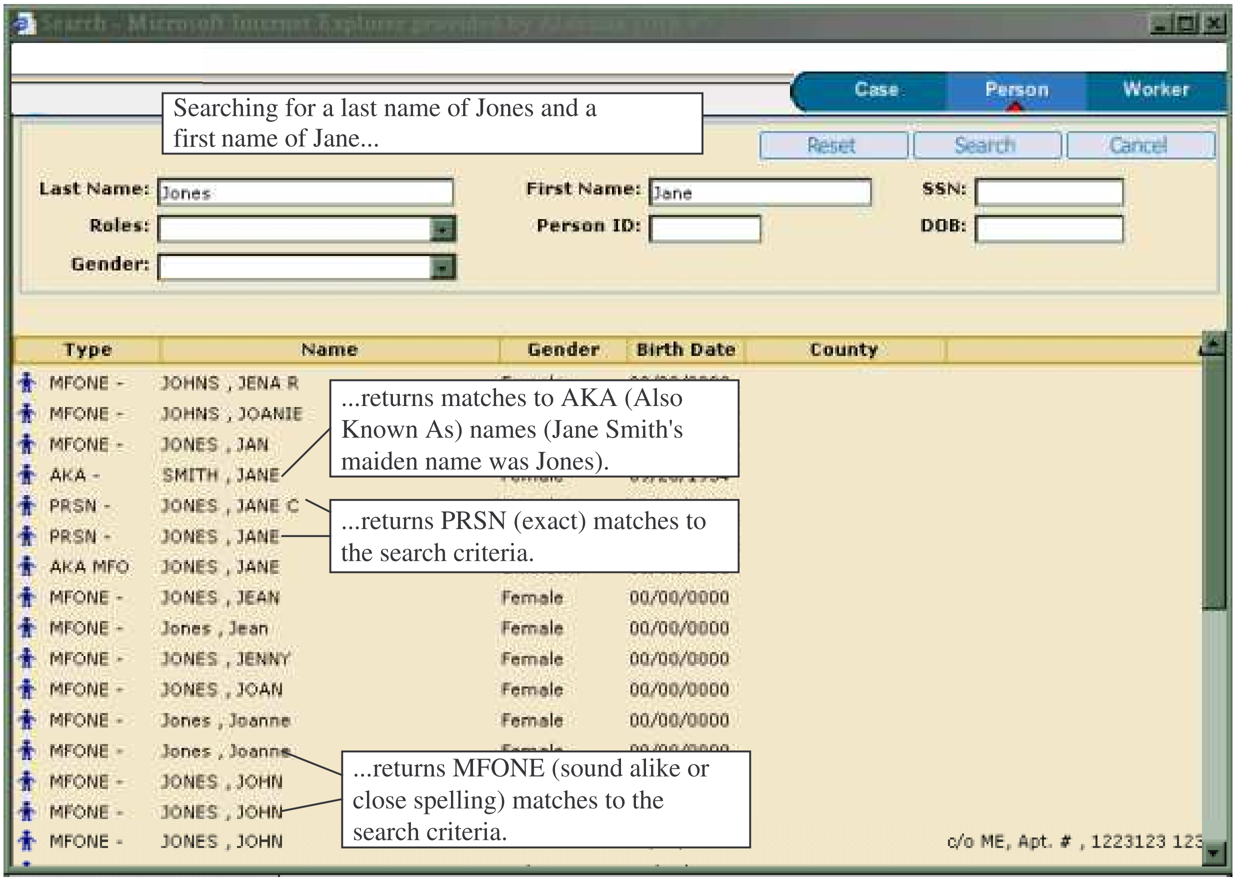
SEARCH TIP: Only intake, assessment or investigation participants that have been verified will be found in a person search.

SEARCH TIP: Only select a role if you only want to find the person if they have that role. If you enter a role as a search criteria, and that person is in the database (but not with that role), you will not find the person.

SEARCH TIP: You can search for SSN, Person ID, and DOB. You should be aware, however, that it is possible for an existing person record to not have this information. Even if all of the other search criteria match, a record will not be returned if an item you included as criteria was not entered on the record.

SEARCH TIP: If you want to try a search based on part of a name, you can use the * as a "wildcard" to replace part of the name. For example: a search for a last name of Jon* and first name of Jane would return any record where the first name was Jane and the last name that starts with Jon.

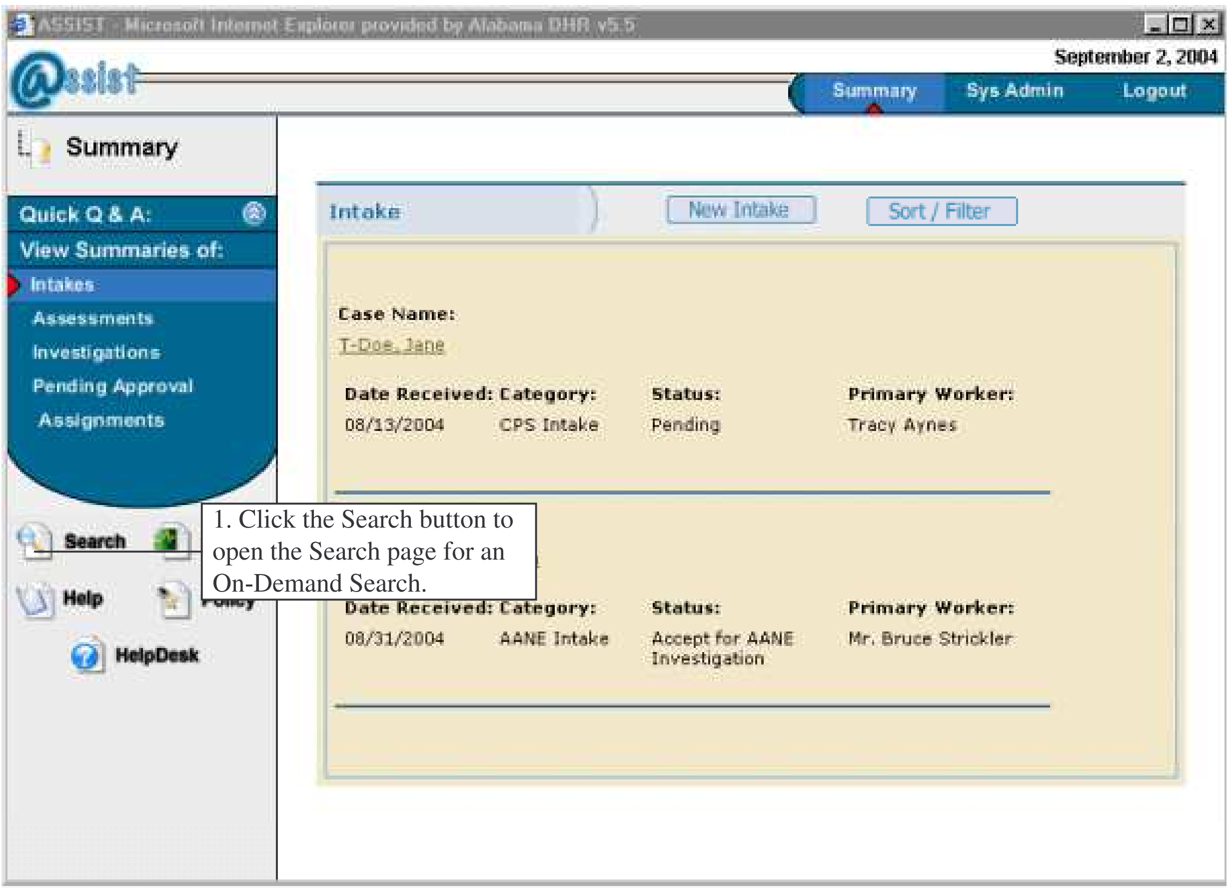
Here is an example of person search results.

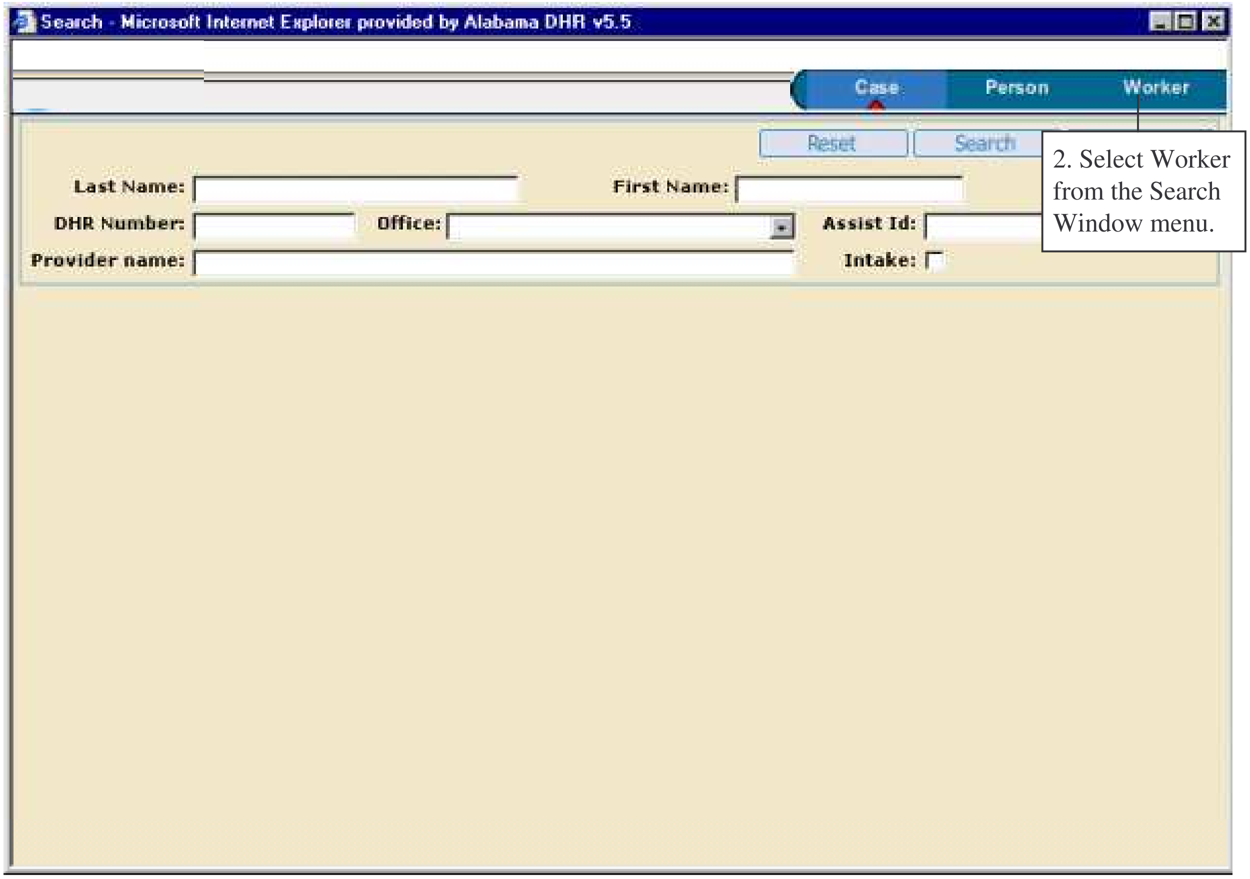


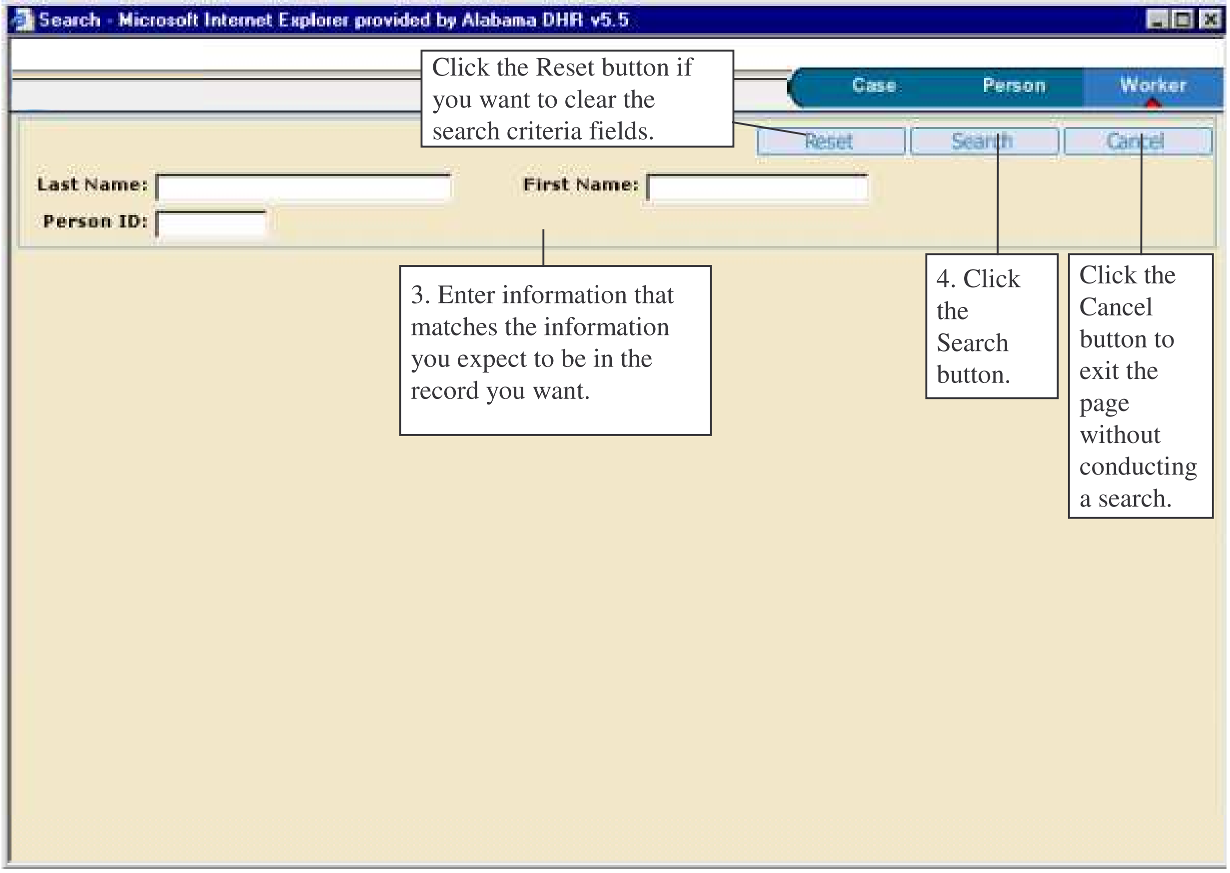
Worker Searches

Purpose: Worker Searches allow you to search for people who are workers, supervisors, or other ASSIST users.

Overview: Worker Searches are available through the Search button located at the bottom of the Sidebar.



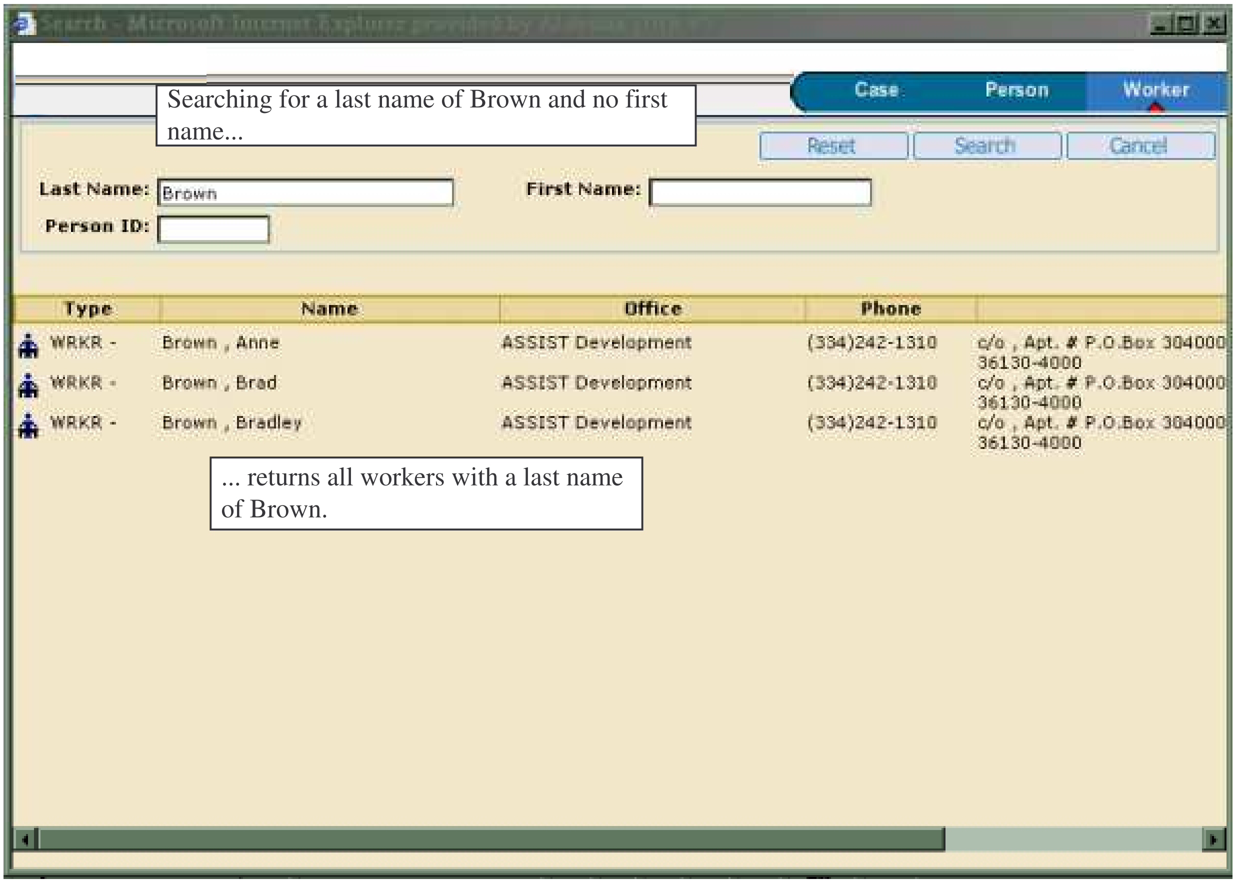

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
Case
Person
Worker
Reset
Search
2. Select Worker from the Search Window menu.
Last Name:
First Name:
DHR Number:
Office:
Assist Id:
Provider name:
Intake:



SEARCH TIP: You can search for Person ID. You should be aware, however, that it is possible for an existing person record to not have this information. Even if all of the other search criteria match, a record will not be returned if an item you included as criteria was not entered on the record.

SEARCH TIP: If you want to try a search based on part of a name, you can use the * as a "wildcard" to replace part of the name. For example: a search for a last name of Jon* and first name of Jane would return any record where the first name was Jane and the last name that starts with Jon.

Here is an example of worker search results.



Special Narrative Types

Purpose: There are special types of narrative that apply to more than one functional area in ASSIST. This section describes these narrative types. Narrative types that apply only to a particular function in ASSIST are covered in the guide for that function.

Overview: Some narrative types are specific to a particular type of work. First Victim Contact, for example, applies only to CPS Assessments or APS Investigations. Other types of narrative are pertinent to all types of work. Alerts and Directions would be useful to anyone who is planning a visit to the client's home.

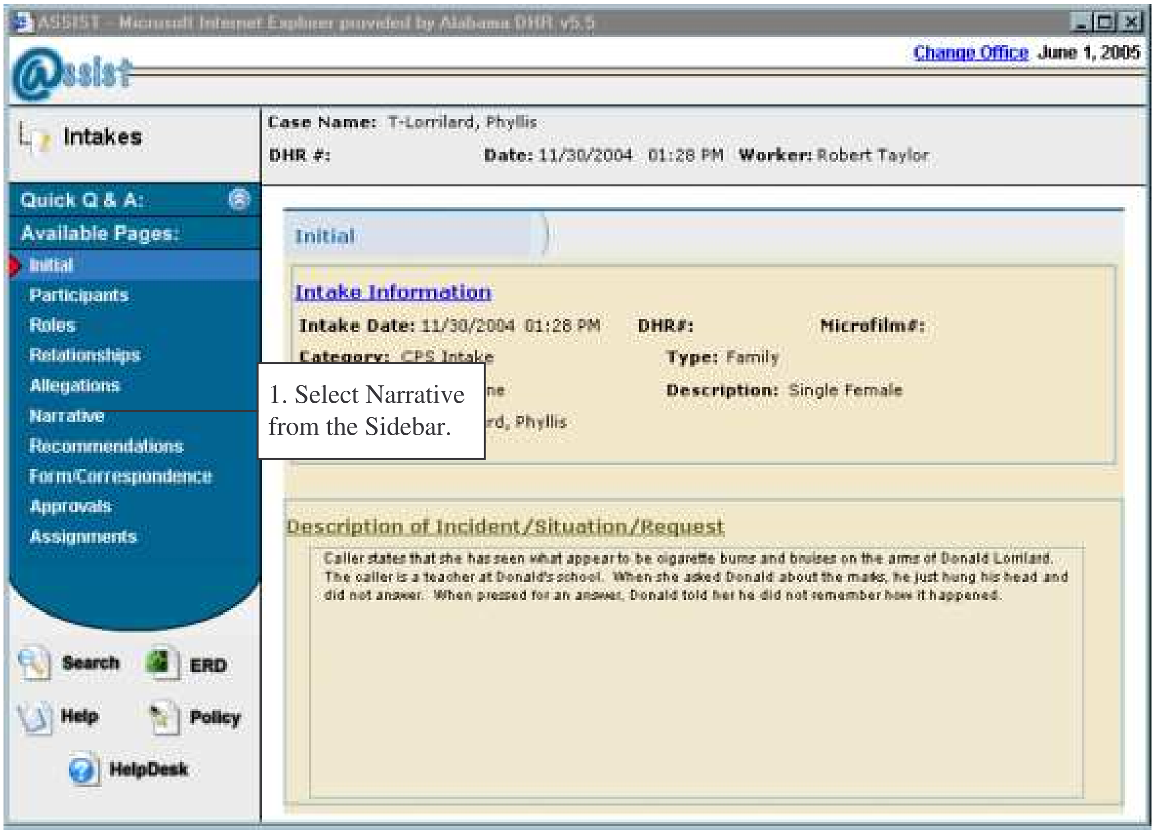
Alerts

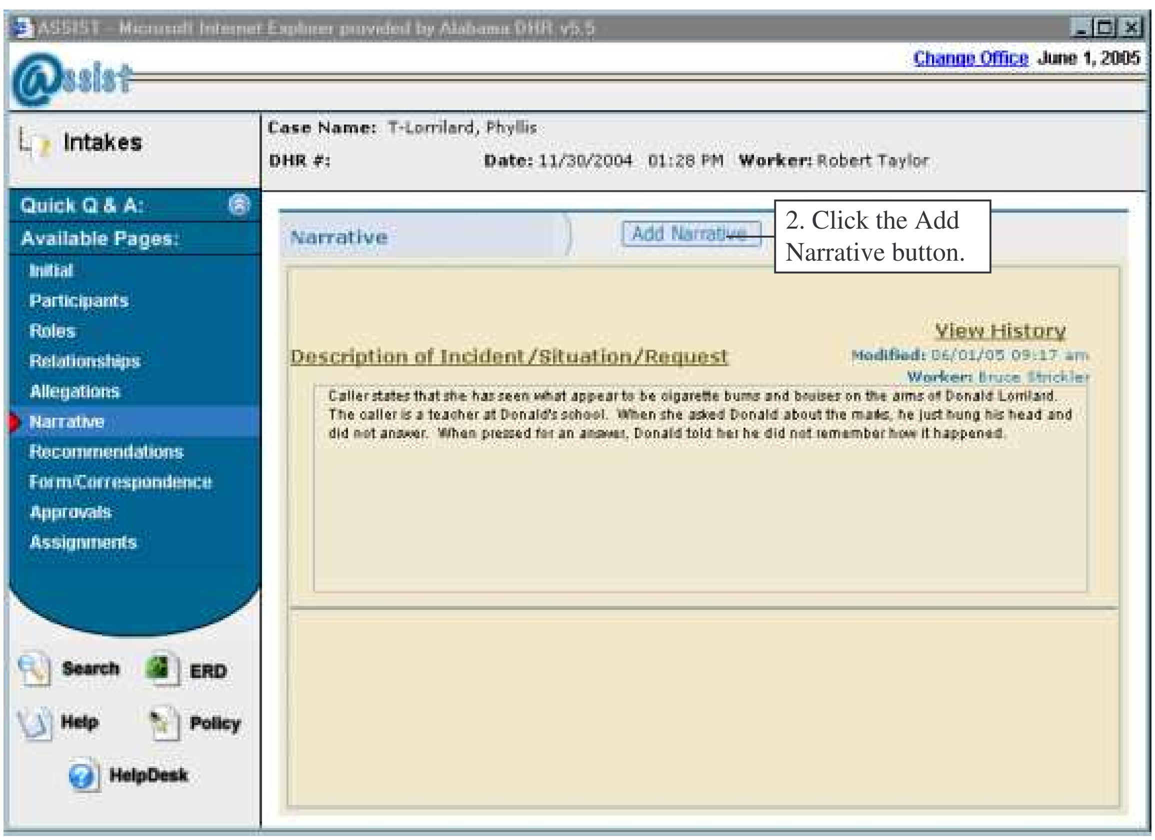
An Alert is used to inform workers of any dangerous conditions that exist in a home or other location they might visit during the course of their work. If the Reporter/Referral Source informs the intake worker that a potential danger exists (such as a vicious dog on the property), the intake worker should enter an Alert to let the Assessment or Investigation worker know about the situation.

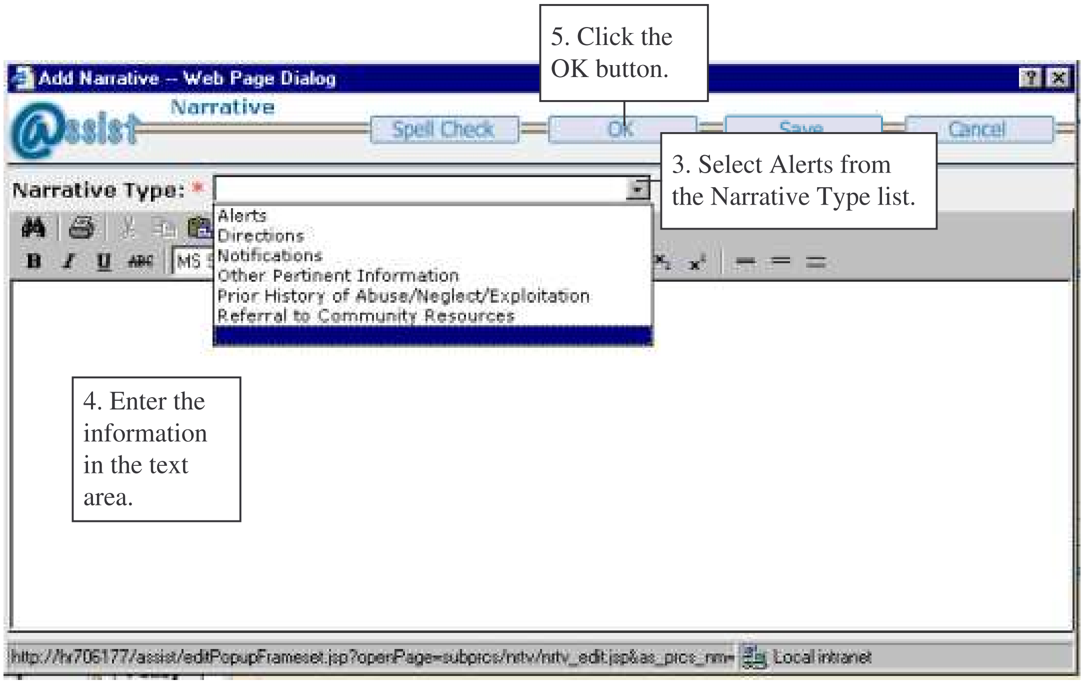
Alerts are entered and maintained from the Narrative page. To get to the Narrative page from the main ASSIST page, follow these steps:

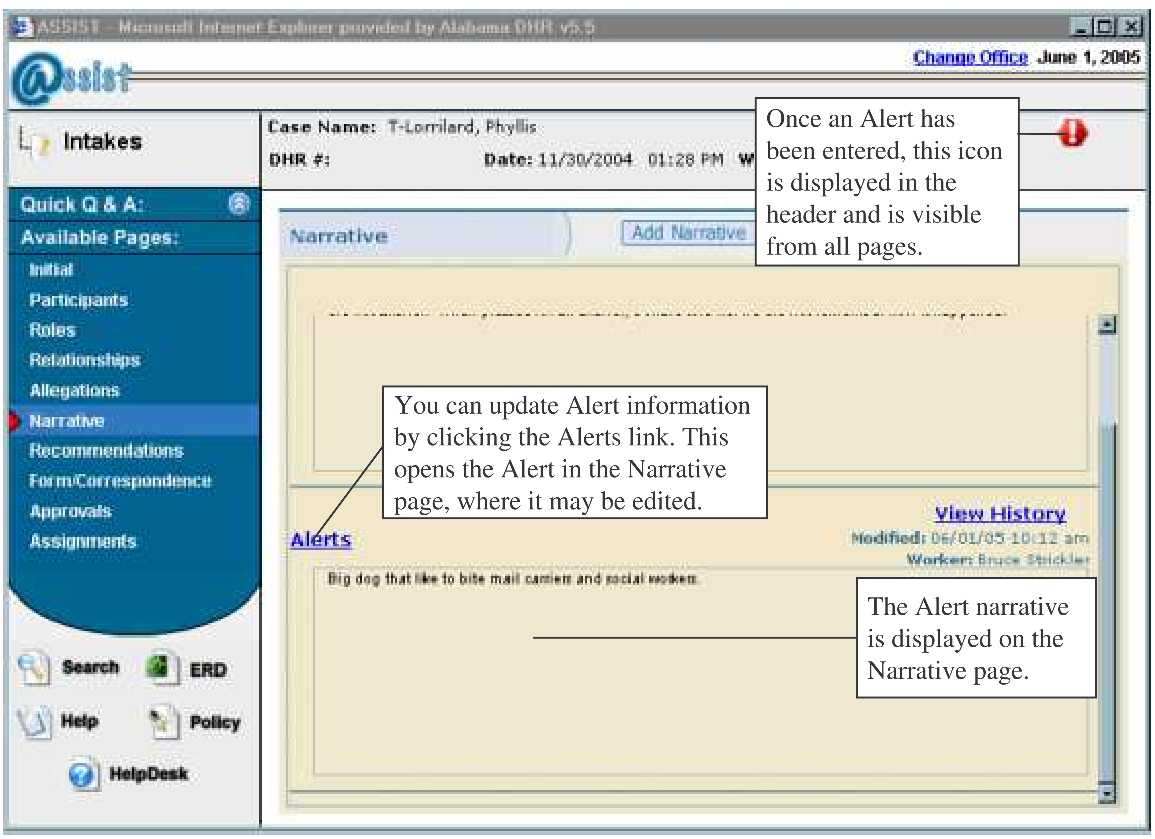
1. Select Summary from the ASSIST menu.
2. Select the type of work (Intakes, Assessments, or Investigations) from the Sidebar.
3. Click the name of the piece of work you want to open.

You are now ready to open the Narrative page. This example involves an intake, but the steps are identical for other types of work.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Change Office June 1, 2005
Intakes
Case Name: T-Lorrilard, Phyllis
DHR #: Date: 11/30/2004 01:28 PM Worker: Robert Taylor
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Initial
Intake Information
Intake Date: 11/30/2004 01:28 PM DHR#: Microfilm#:
Type: Family
Description: Single Female
1. Select Narrative from the Sidebar.
Description of Incident/Situation/Request
Caller states that she has seen what appear to be cigarette burns and bruises on the arms of Donald Lorrilard. The caller is a teacher at Donald's school. When she asked Donald about the marks, he just hung his head and did not answer. When pressed for an answer, Donald told her he did not remember how it happened.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Change Office June 1, 2005
Intakes
Case Name: T-Lorrilard, Phyllis
DHR #: Date: 11/30/2004 01:28 PM Worker: Robert Taylor
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Narrative
Add Narrative
2. Click the Add Narrative button.
View History
Description of Incident/Situation/Request
Modified: 06/01/05 09:17 am
Worker: Bruce Strickler
Caller states that she has seen what appear to be cigarette burns and bruises on the arms of Donald Lorrilard. The caller is a teacher at Donald's school. When she asked Donald about the marks, he just hung his head and did not answer. When pressed for an answer, Donald told her he did not remember how it happened.


Add Narrative -- Web Page Dialog
Narrative
Spell Check
OK
Save
Cancel
Narrative Type: *
Alerts
Directions
Notifications
Other Pertinent Information
Prior History of Abuse/Neglect/Exploitation
Referral to Community Resources
5. Click the OK button.
3. Select Alerts from the Narrative Type list.
4. Enter the information in the text area.
http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/nrtv/nrtv_edit.jsp&as_prcs_nm=
Local intranet


Change Office
June 1, 2005
Intakes
Case Name: T-Lorrilard, Phyllis
DHR #:
Date: 11/30/2004 01:28 PM
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Narrative
Add Narrative
Once an Alert has been entered, this icon is displayed in the header and is visible from all pages.
You can update Alert information by clicking the Alerts link. This opens the Alert in the Narrative page, where it may be edited.
Alerts
View History
Modified: 06/01/05 10:12 am
Worker: Bruce Strickler
Big dog that like to bite mail carriers and social workers.
The Alert narrative is displayed on the Narrative page.

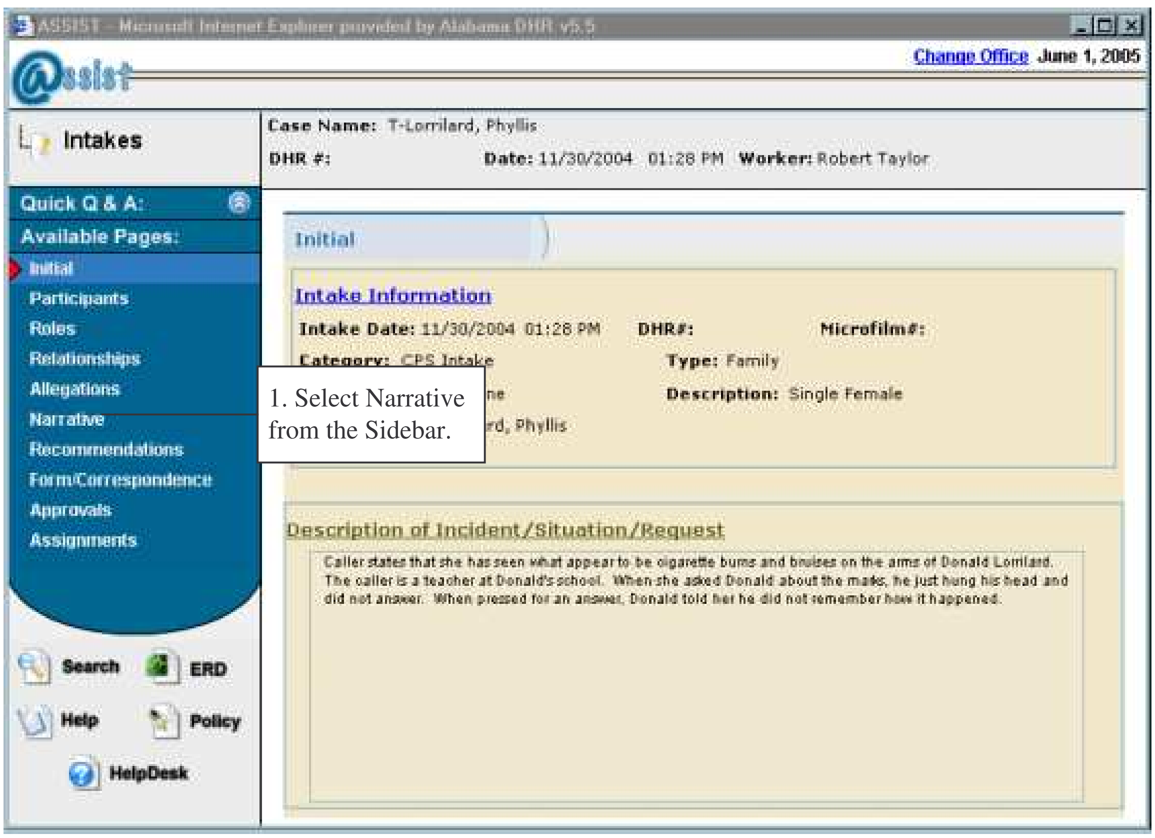
Directions

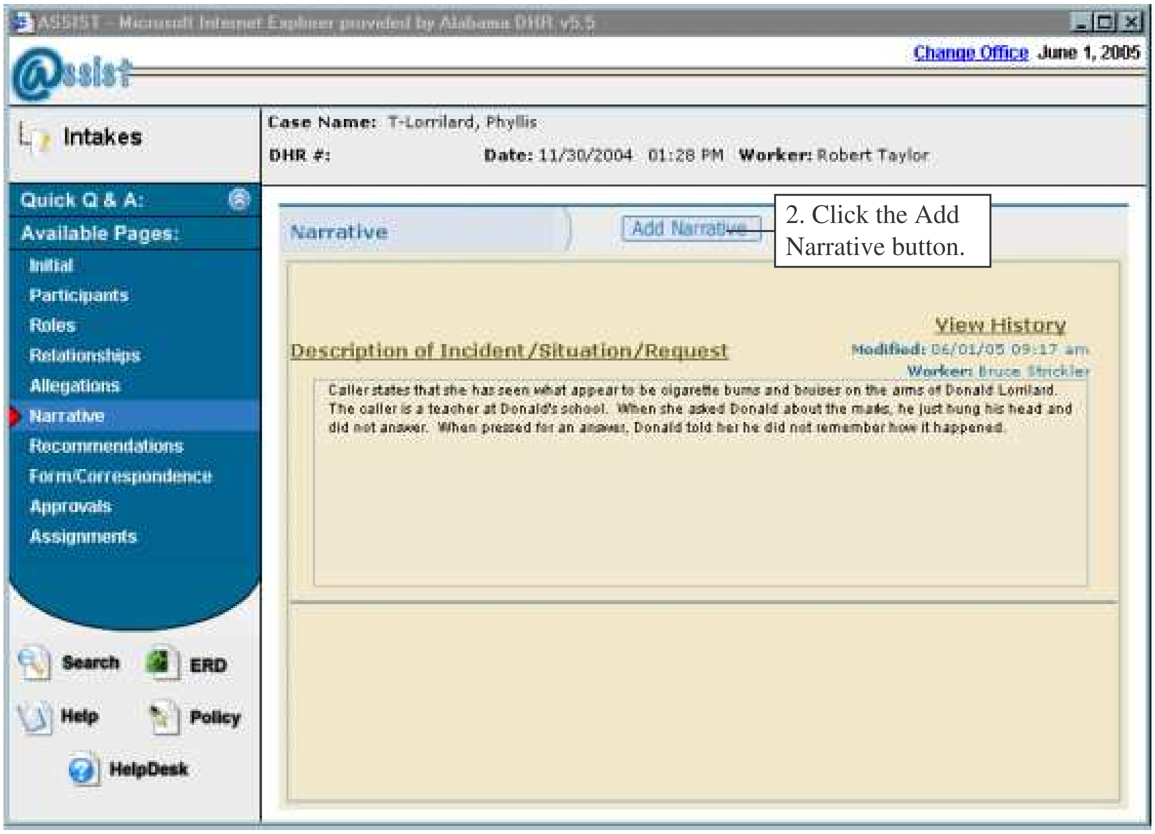
Directions are used to provide workers with instructions on how to find a home. If the Reporter/Referral Source provides directions to the home, the intake worker should enter Directions to help the Assessment or Investigation worker locate the home.

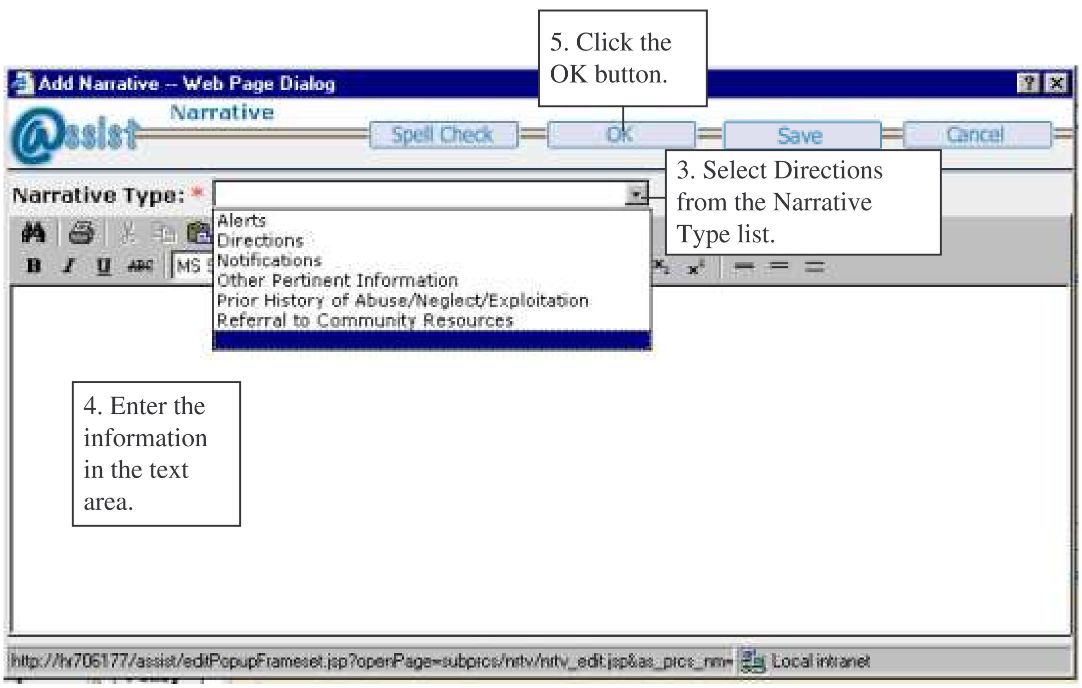
Directions are entered and maintained from the Narrative page. To get to the Narrative page from the main ASSIST page, follow these steps:

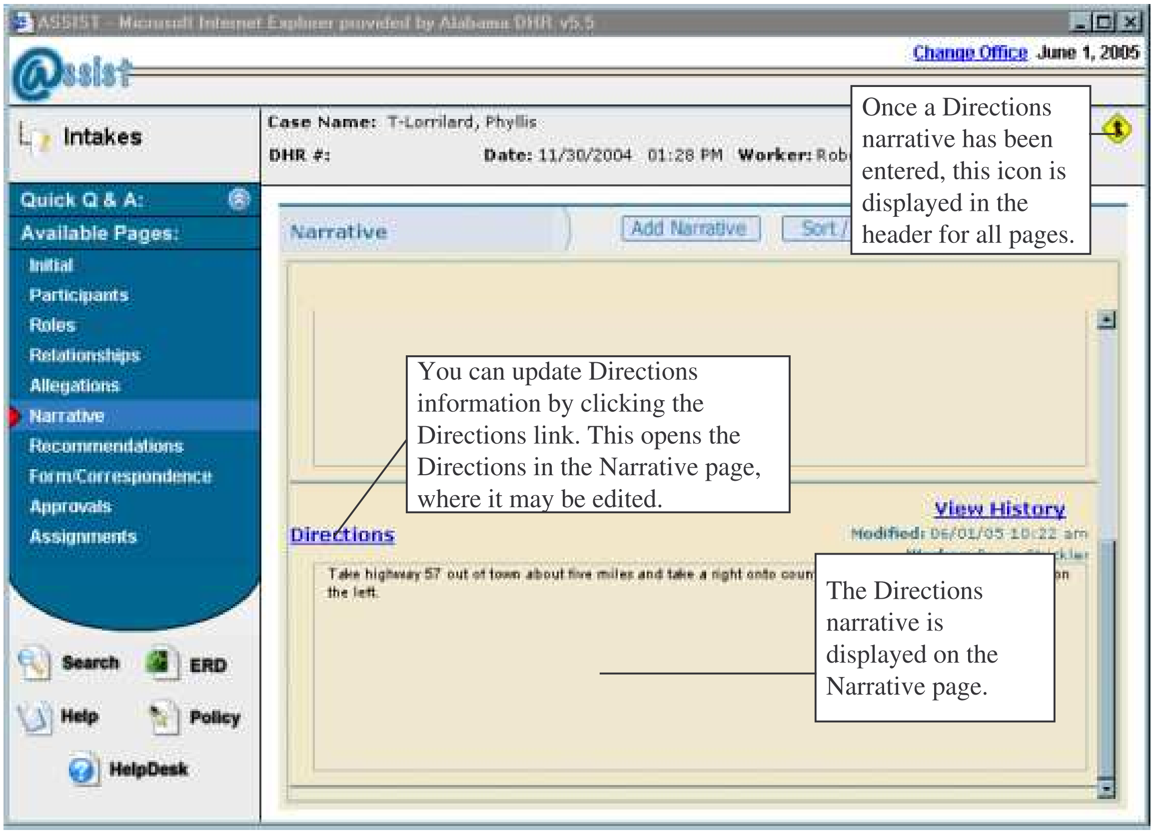
1. Select Summary from the ASSIST menu.
2. Select the type of work (Intake, Assessment, or Investigation) from the Sidebar.
3. Click the name of the piece of work you want to open.

You are now ready to open the Narrative page. This example involves an intake, but the steps are identical for other types of work.




ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Change Office June 1, 2005
Intakes
Case Name: T-Lorrilard, Phyllis
DHR #: Date: 11/30/2004 01:28 PM Worker: Robert Taylor
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Narrative
Add Narrative
2. Click the Add Narrative button.
View History
Description of Incident/Situation/Request
Modified: 06/01/05 09:17 am
Worker: Bruce Strickler
Caller states that she has seen what appear to be cigarette burns and bruises on the arms of Donald Lorrilard. The caller is a teacher at Donald's school. When she asked Donald about the marks, he just hung his head and did not answer. When pressed for an answer, Donald told her he did not remember how it happened.


5. Click the OK button.
Add Narrative -- Web Page Dialog
Narrative
Spell Check
OK
Save
Cancel
3. Select Directions from the Narrative Type list.
Narrative Type: *
Alerts
Directions
Notifications
Other Pertinent Information
Prior History of Abuse/Neglect/Exploitation
Referral to Community Resources
4. Enter the information in the text area.
http://hr706177/assist/editPopupFrameset.jsp?openPage=subprcs/nrtv/nrtv_edit.jsp&as_prcs_nm=
Local intranet


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Change Office June 1, 2005
Intakes
Case Name: T-Lorrilard, Phyllis
DHR #:
Date: 11/30/2004 01:28 PM Worker:
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Narrative
Add Narrative
Directions
View History
Modified: 06/01/05 10:22 am
Once a Directions narrative has been entered, this icon is displayed in the header for all pages.
You can update Directions information by clicking the Directions link. This opens the Directions in the Narrative page, where it may be edited.
The Directions narrative is displayed on the Narrative page.

Sorting and Filtering Narrative

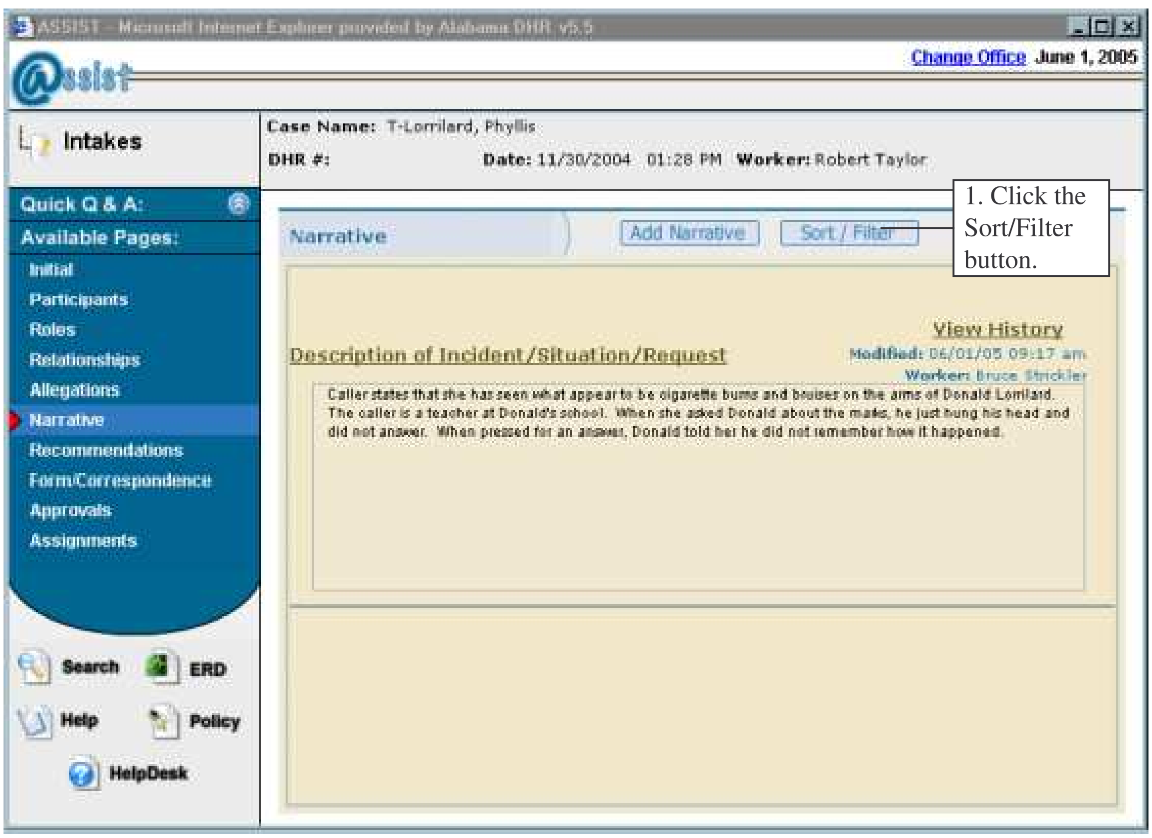
Purpose: ASSIST allows you to sort and filter the narrative displayed on the Narrative page. This makes it easier to find a particular piece of narrative. This is especially useful once you have entered a lot of different types of notes.

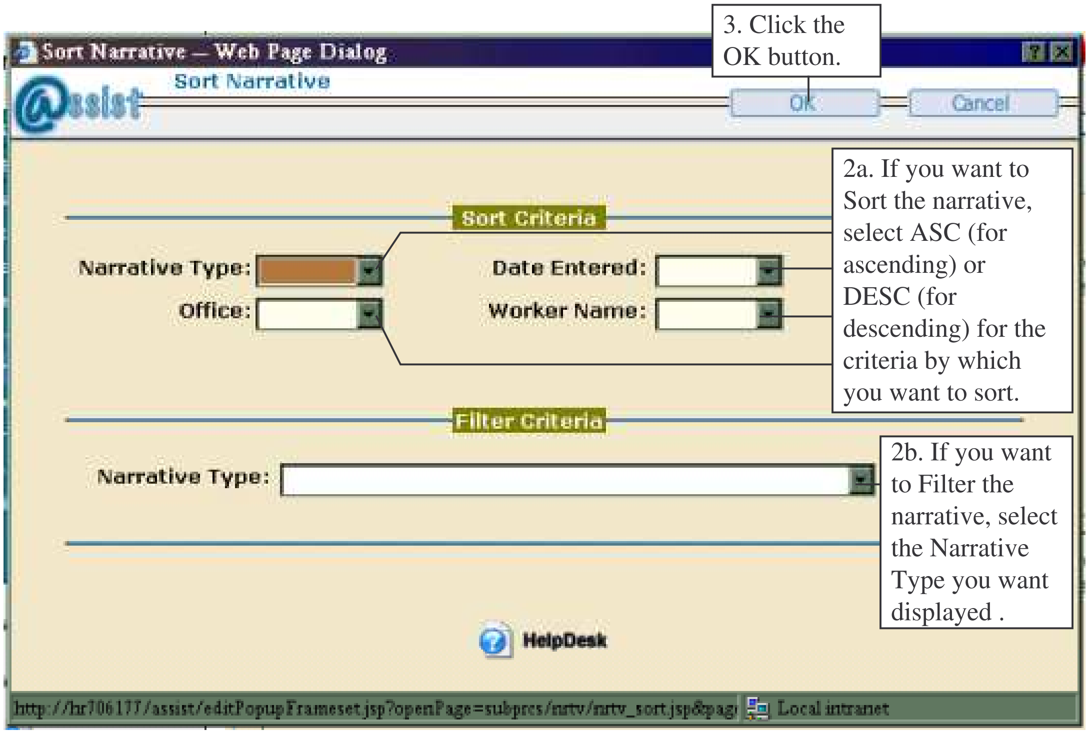
Overview: The Sort/Filter button on the Narrative page provides the means to select criteria for changing the order of notes and selecting a specific type of note to display. Narratives can be sorted in ascending or descending order by Narrative Type, Office, Date Entered, or Worker Name. You can select a Narrative Type by which to filter the narrative display. When you filter the narrative, only the selected narrative type is displayed. Sorting and filtering does not affect the way narrative appears when printed from Forms/Correspondence.

To open the Narrative page from the Summary Page:

1. Select Intakes, Investigations, or Assessments from the Sidebar.
2. Select Narrative from the Sidebar.

This example involves an intake, but Sort/Filter functions the same in investigations and assessments.



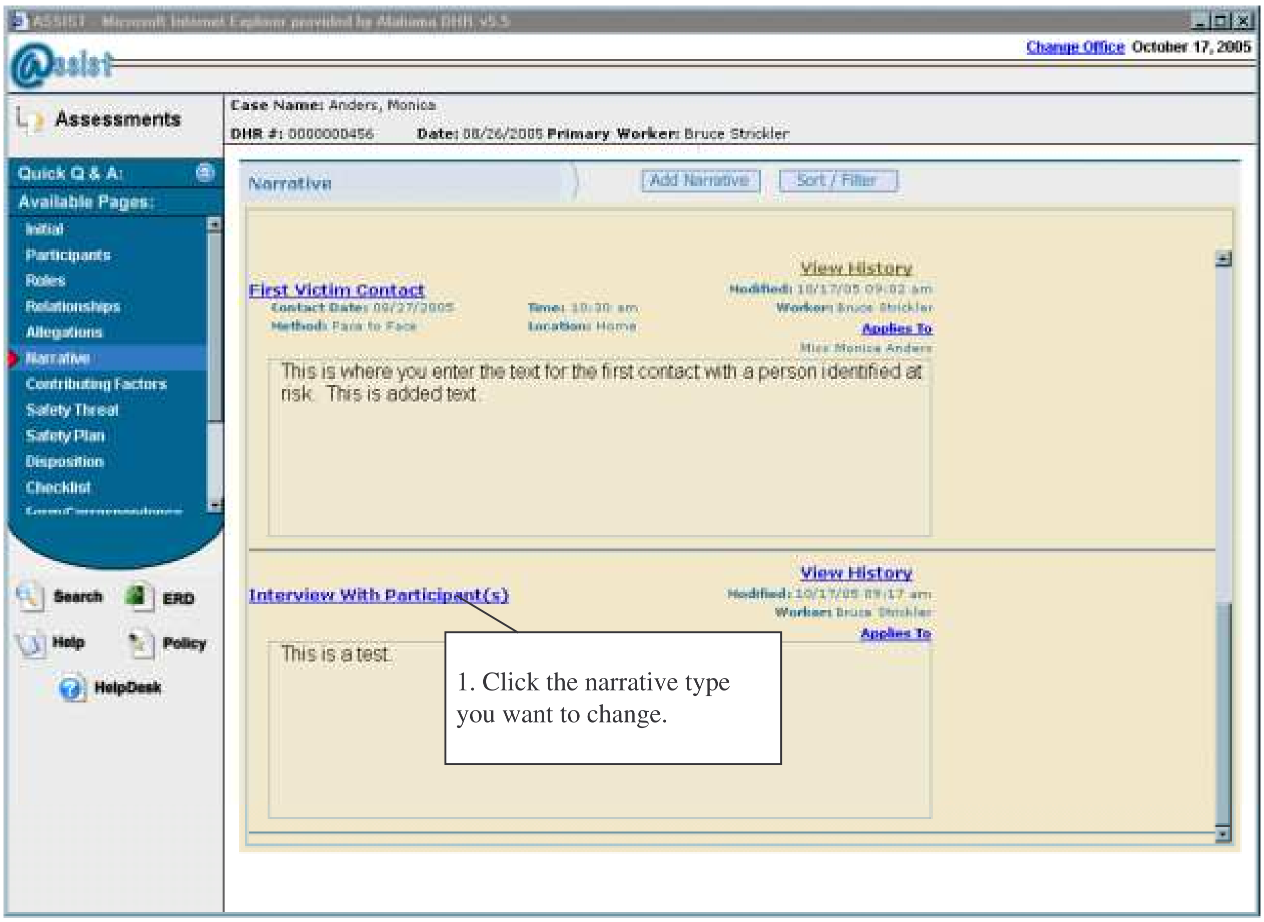

3. Click the OK button.
Sort Narrative – Web Page Dialog
Sort Narrative
OK
Cancel
2a. If you want to Sort the narrative, select ASC (for ascending) or DESC (for descending) for the criteria by which you want to sort.
Sort Criteria
Narrative Type:
Date Entered:
Office:
Worker Name:
Filter Criteria
Narrative Type:
2b. If you want to Filter the narrative, select the Narrative Type you want displayed .
HelpDesk
Local intranet

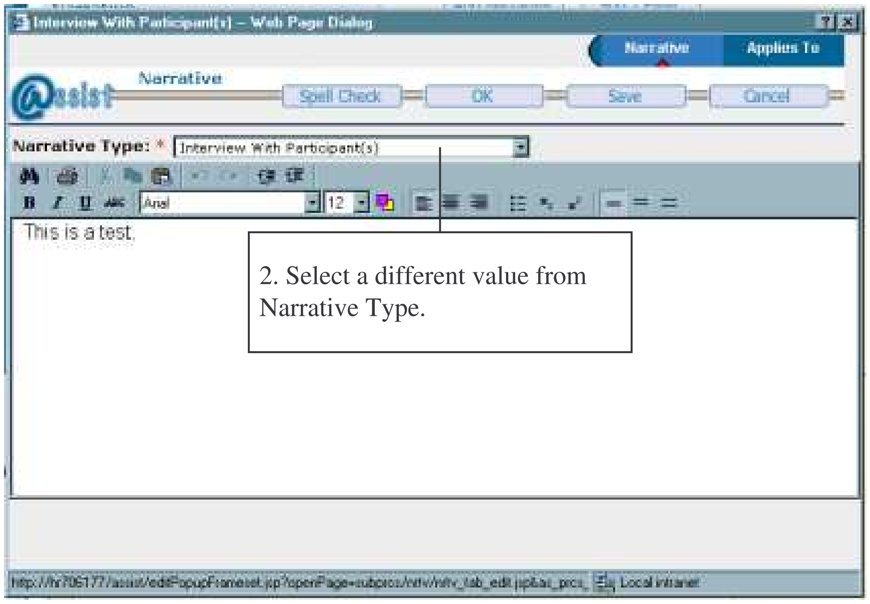
Changing A Narrative Type

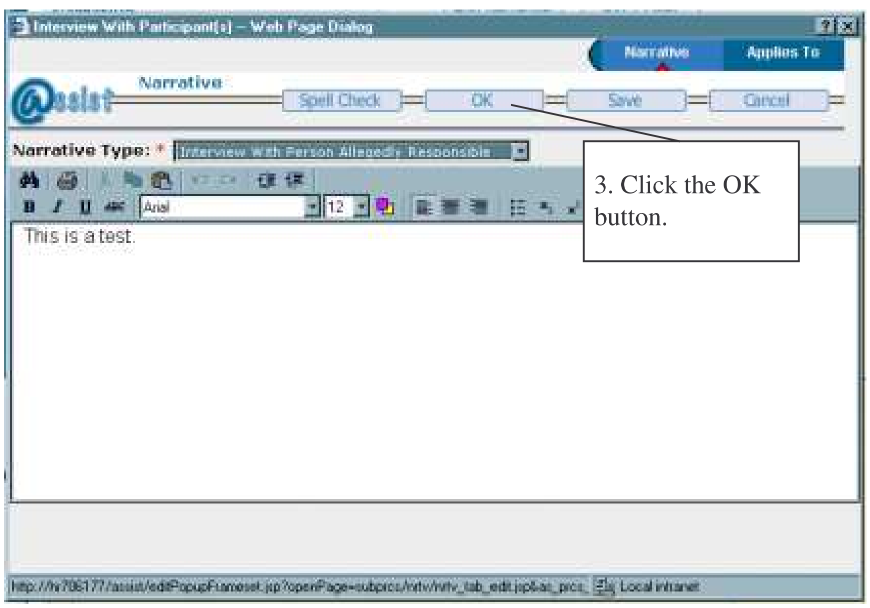
Purpose: Allows the narrative type for a narrative entry to be changed.

Overview: Narrative types can be changed on the Narrative Page.   To open the Narrative page, open the piece of work and select Narrative from the Sidebar.

You are now ready to change a narrative type.




Interview With Participant(s) – Web Page Dialog
Narrative
Applies To
Narrative
Spell Check
OK
Save
Cancel
Narrative Type: *
Interview With Participant(s)
Arial
12
This is a test.
2. Select a different value from Narrative Type.
Local intranet


Interview With Participant(s) – Web Page Dialog
Narrative
Applies To
Narrative
Spell Check
OK
Save
Cancel
Narrative Type: *
Interview With Person Allegedly Responsible
Arial
12
This is a test.
3. Click the OK button.
Local intranet

Viewing Narrative and Approval History

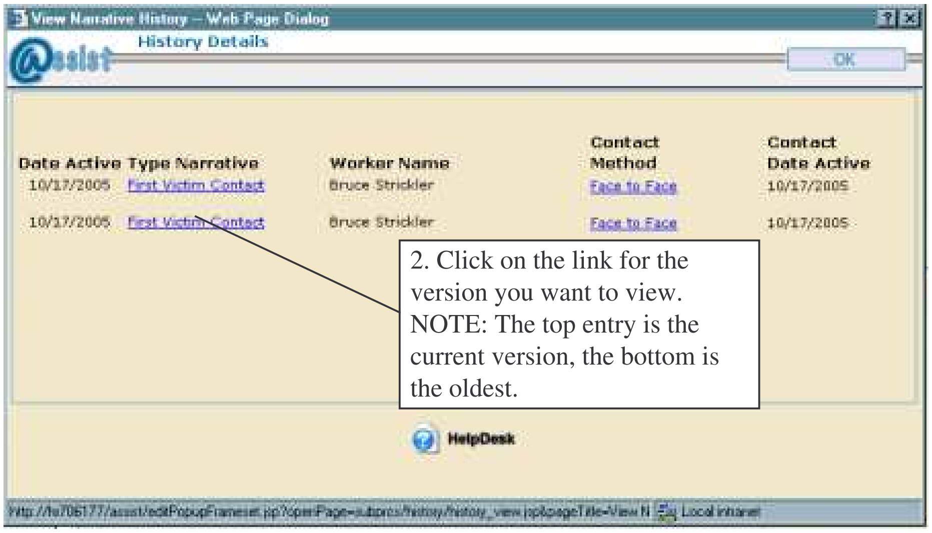
Purpose: ASSIST allows you to view the past versions of narrative and the approval activities for an intake, assessment, or investigation. For narrative, this provides a record of the original text entered by the worker, any changes made by the worker, and any changes made by the supervisor or manager. For approvals, this provides a record of the dates for approval requests, recalls, returns, and approvals.

Overview: The View History function is available to all ASSIST users. It provides a record of narratives entered/changed and approval activity. Each entry displays the date of the entry/change and the name of the person who made it.

Narrative History

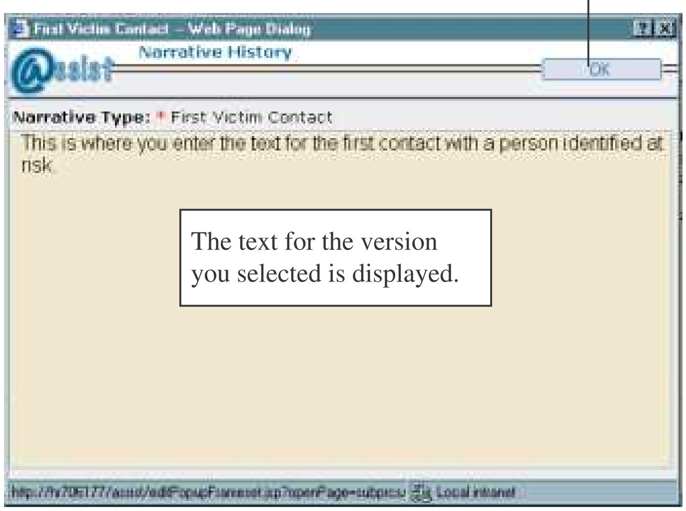
You view the history for a narrative from the Narrative page in the piece of work containing the narrative. To open the narrative page, open the piece of work containing the narrative and select Narrative from the Sidebar. Find the narrative for which you want to view the history.

You are now ready to view the narrative



2. Click on the link for the version you want to view. NOTE: The top entry is the current version, the bottom is the oldest.

3. Click the OK button to return to the History Details page.



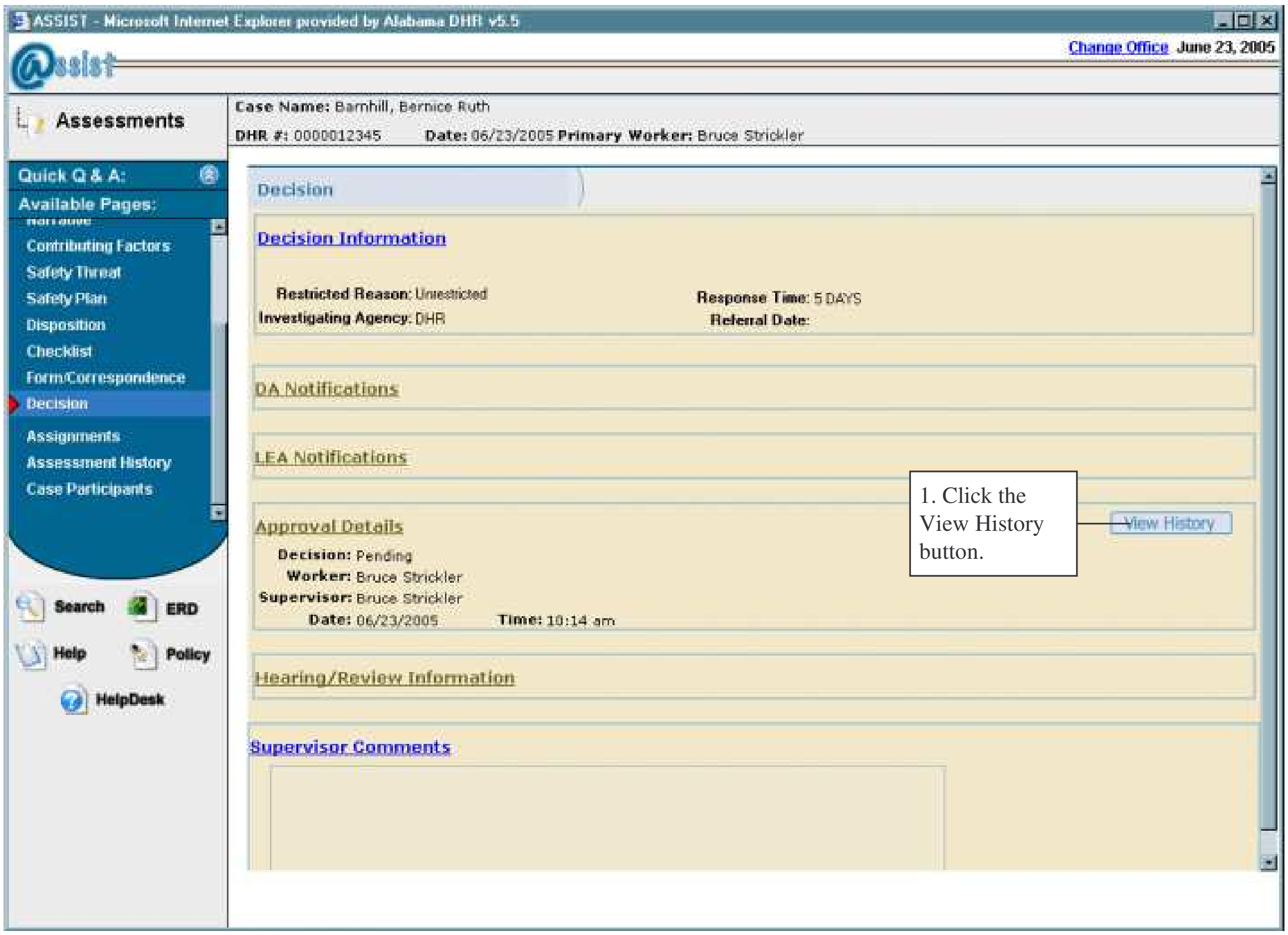
The text for the version you selected is displayed.

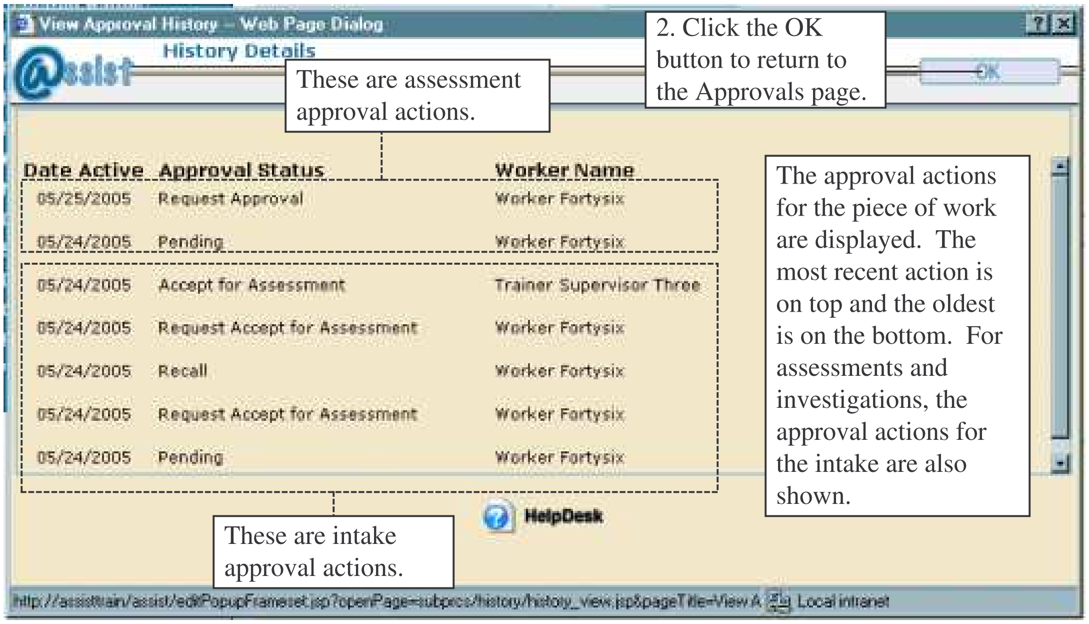
4. Click the OK button to return to the Narrative page.

Approval History

You view the approval history for an intake, assessment, or investigation from the Approvals page in an intake or the Decision page in an assessment or investigation. To open the Approvals or Decision page, open the piece of work containing the narrative and select Approvals (for an intake) or Decision (for an assessment or investigation) from the Sidebar.

You are now ready to view the approval history.




View Approval History -- Web Page Dialog
@ssist
History Details
OK
2. Click the OK button to return to the Approvals page.
These are assessment approval actions.
Date Active
Approval Status
Worker Name
05/25/2005 Request Approval Worker Fortysix
05/24/2005 Pending Worker Fortysix
05/24/2005 Accept for Assessment Trainer Supervisor Three
05/24/2005 Request Accept for Assessment Worker Fortysix
05/24/2005 Recall Worker Fortysix
05/24/2005 Request Accept for Assessment Worker Fortysix
05/24/2005 Pending Worker Fortysix
The approval actions for the piece of work are displayed. The most recent action is on top and the oldest is on the bottom. For assessments and investigations, the approval actions for the intake are also shown.
These are intake approval actions.
HelpDesk
http://assisttrain/assist/editPopupFrameset.jsp?openPage=subprcs/history/history_view.jsp&pageTitle=View A
Local intranet

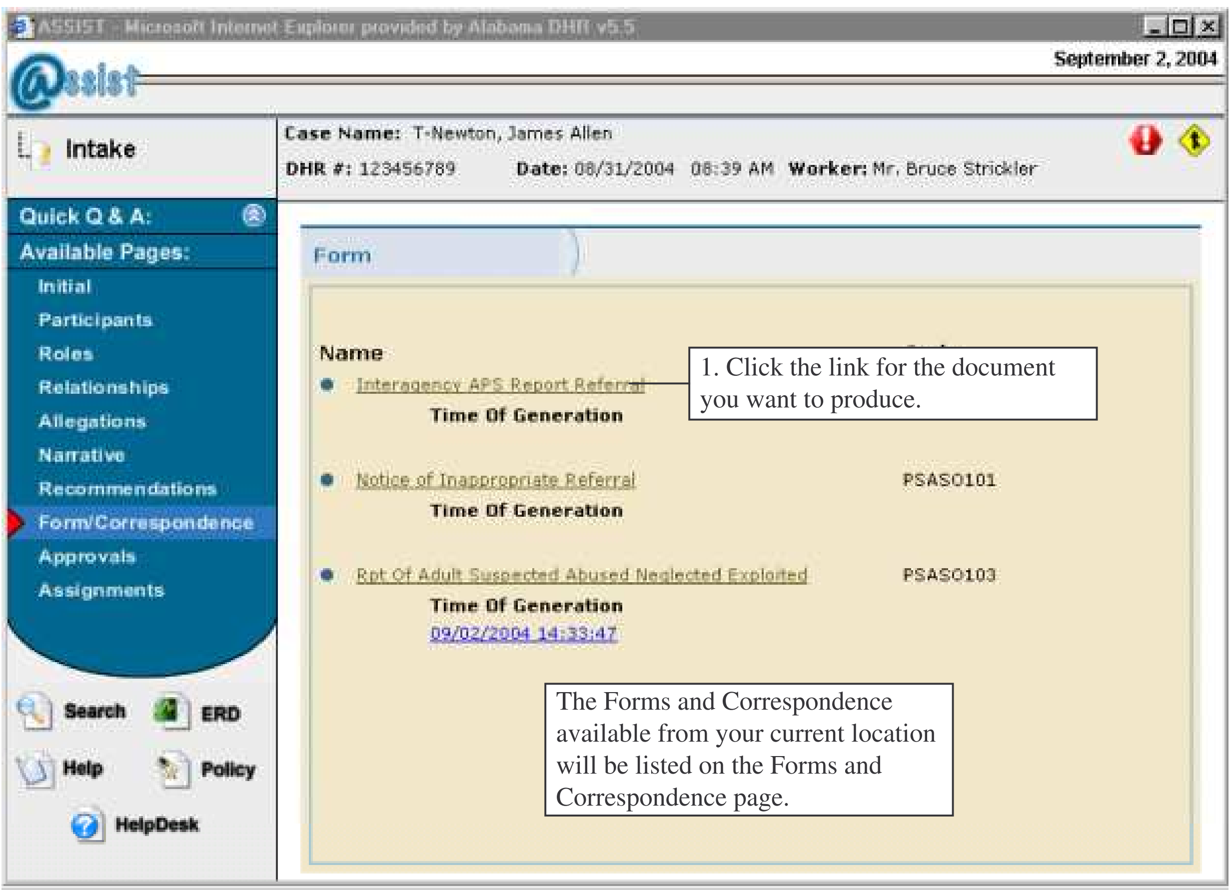
Forms and Correspondence

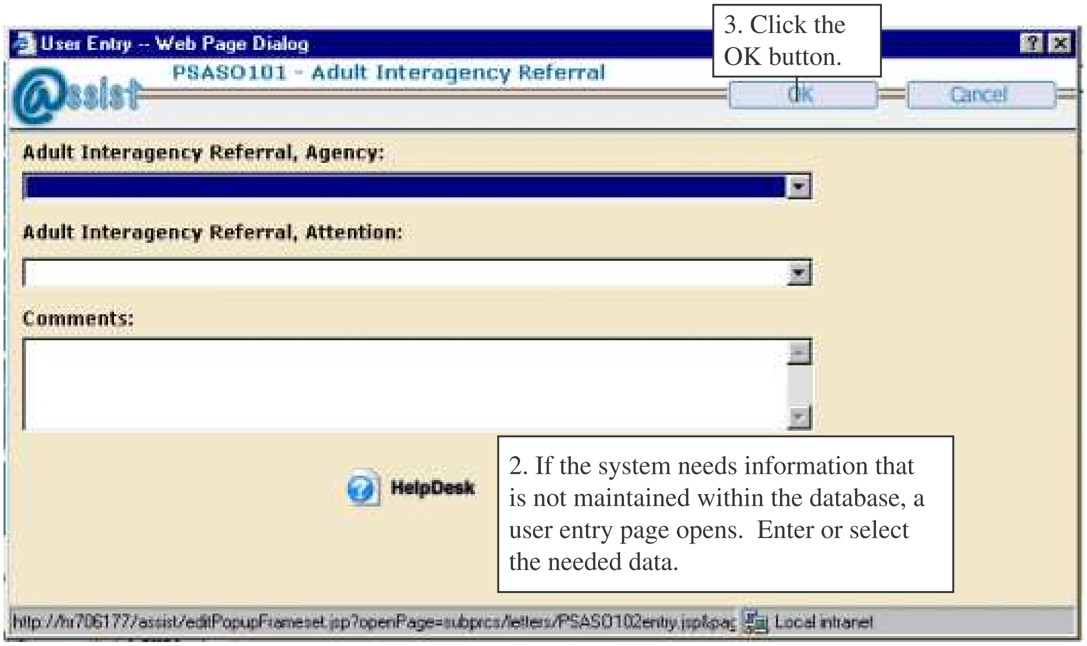
Purpose: Forms and Correspondence allows you to generate specific forms, reports, and correspondence from ASSIST.

Overview: The Forms and Correspondence page generates a variety of printable products. The product the page produces depends on the location of the page. For example, the Forms and Correspondence page you access from the Intake page has a different set of products from those produced by the Assessment Forms and Correspondence page.

You will access the Forms and Correspondence page by selecting Forms and Correspondence from the Sidebar. Please note: Some areas in ASSIST do not have any forms or correspondence. In those areas, the Forms and Correspondence option will not be displayed

Once on the Forms and Correspondence page, here is how you produce the documents:





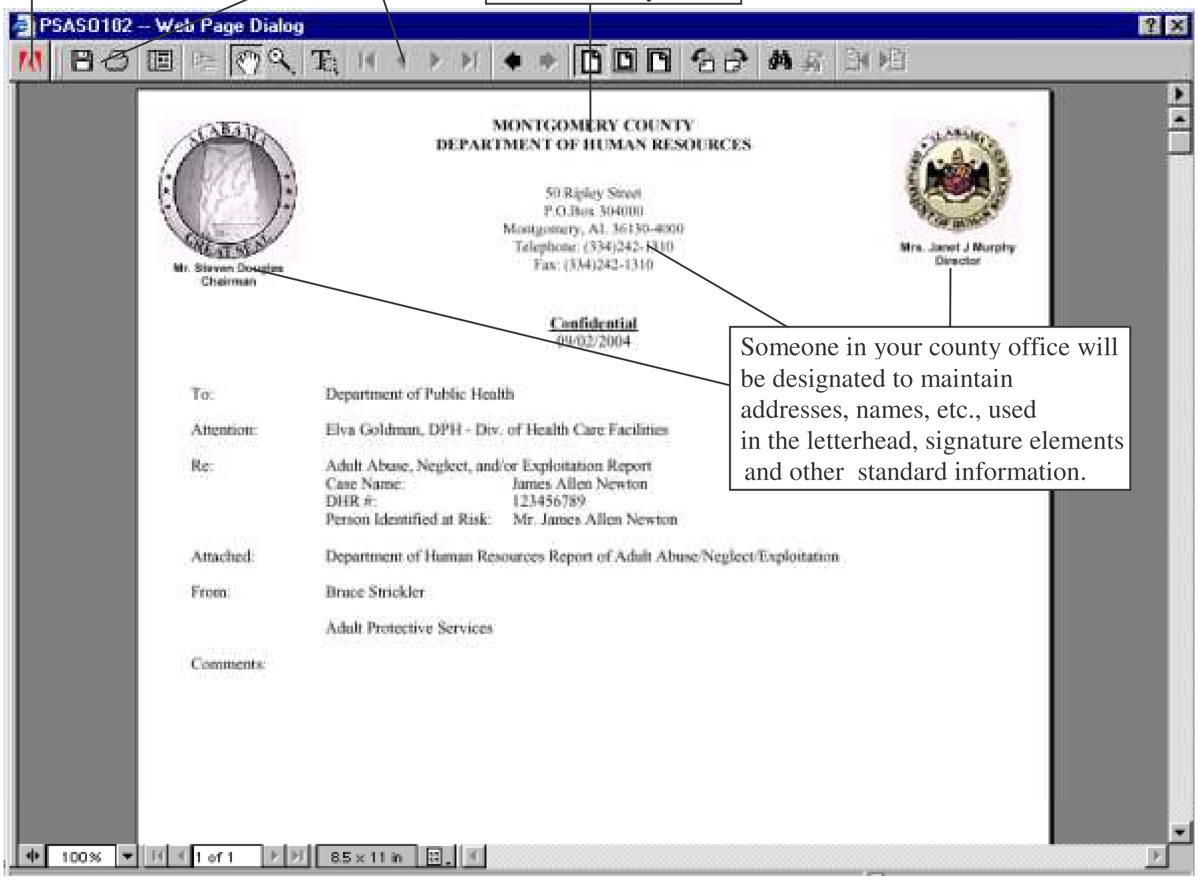
3. Click the OK button.

2. If the system needs information that is not maintained within the database, a user entry page opens. Enter or select the needed data.

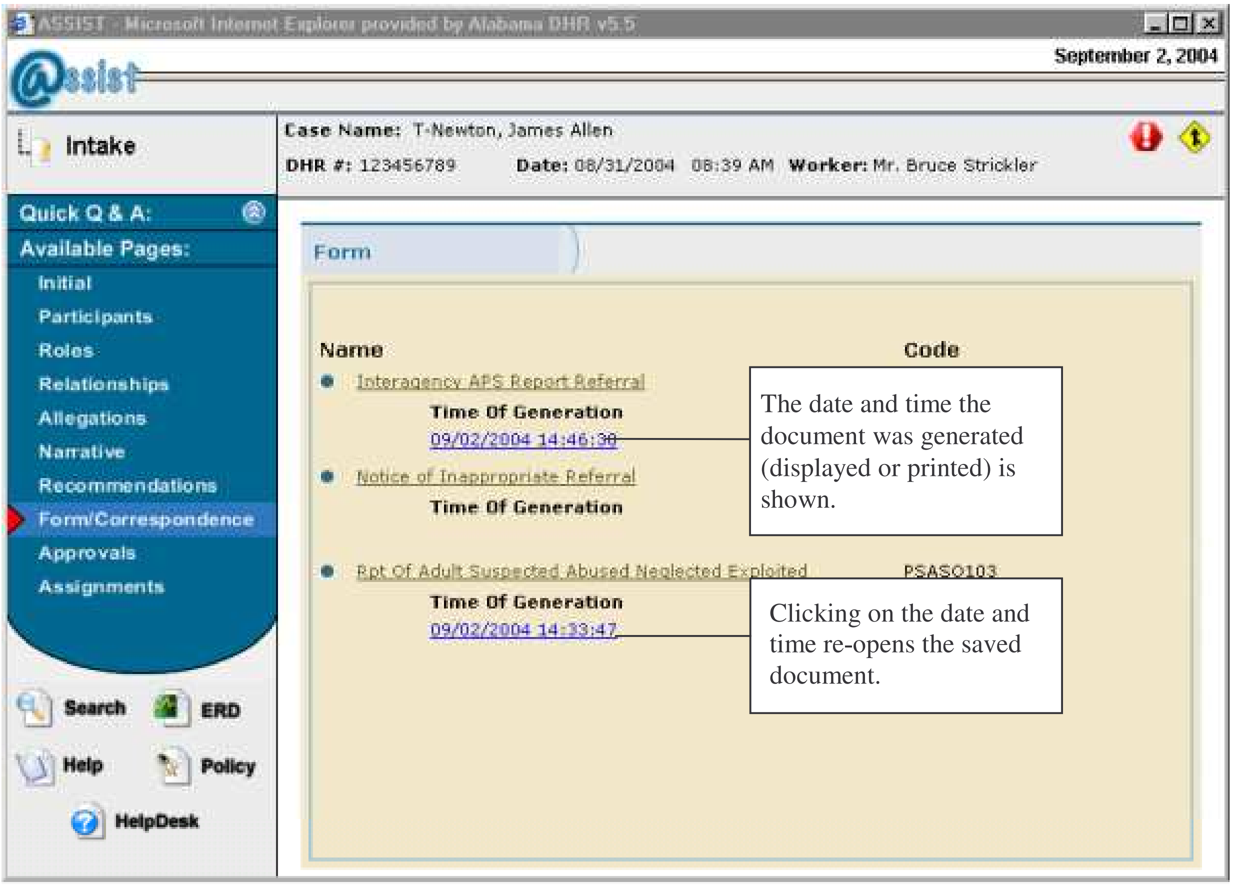
The document opens in Adobe Acrobat Reader.

All of the functions provided by Adobe Acrobat Reader (print and save included) are available from the toolbar.

Do not print on pre-printed letterhead, ASSIST prints the letterhead for you.



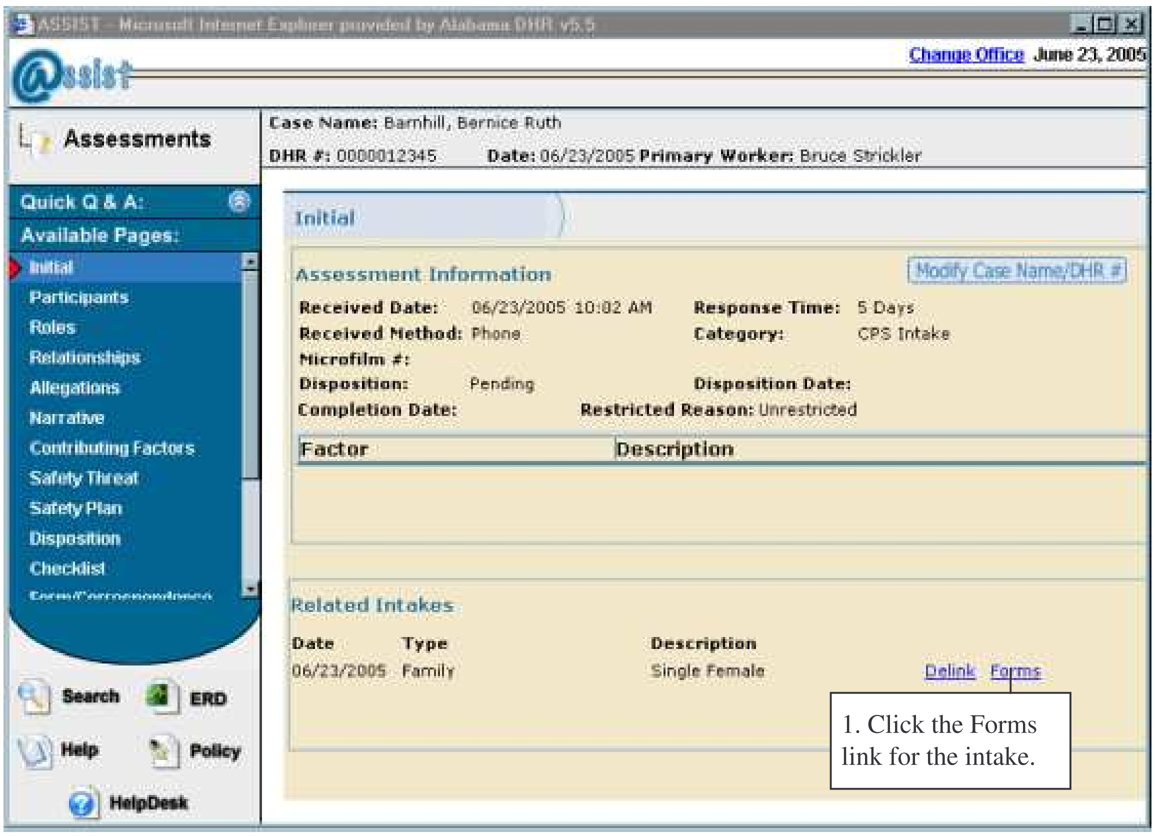
Someone in your county office will be designated to maintain addresses, names, etc., used in the letterhead, signature elements and other standard information.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
September 2, 2004
Intake
Case Name: T-Newton, James Allen
DHR #: 123456789 Date: 08/31/2004 08:39 AM Worker: Mr. Bruce Strickler
Quick Q & A:
Available Pages:
Initial
Participants
Roles
Relationships
Allegations
Narrative
Recommendations
Form/Correspondence
Approvals
Assignments
Search
ERD
Help
Policy
HelpDesk
Form
Name
Code
Interagency APS Report Referral
Time Of Generation
09/02/2004 14:46:38
Notice of Inappropriate Referral
Time Of Generation
Rpt Of Adult Suspected Abused Neglected Exploited
PSASO103
Time Of Generation
09/02/2004 14:33:47
The date and time the document was generated (displayed or printed) is shown.
Clicking on the date and time re-opens the saved document.

Accessing Forms and Correspondence for Intakes linked to an Assessment or Investigation

Once an intake has been linked to an assessment or investigation, you will not be able to access the intake's forms and correspondence from the intake. You can open the intake's forms and correspondence from the assessment's or investigation's Initial page. To access the Initial page from the main ASSIST page, follow these steps:

1. Select Summary from the ASSIST menu.
2. Select Assessments or Investigations from the Sidebar.
3. Click the name of the Assessment or Investigation.



1. Click the Forms link for the intake.

Refer to the instructions for Forms and Correspondence beginning at step 2 for the rest of the steps.

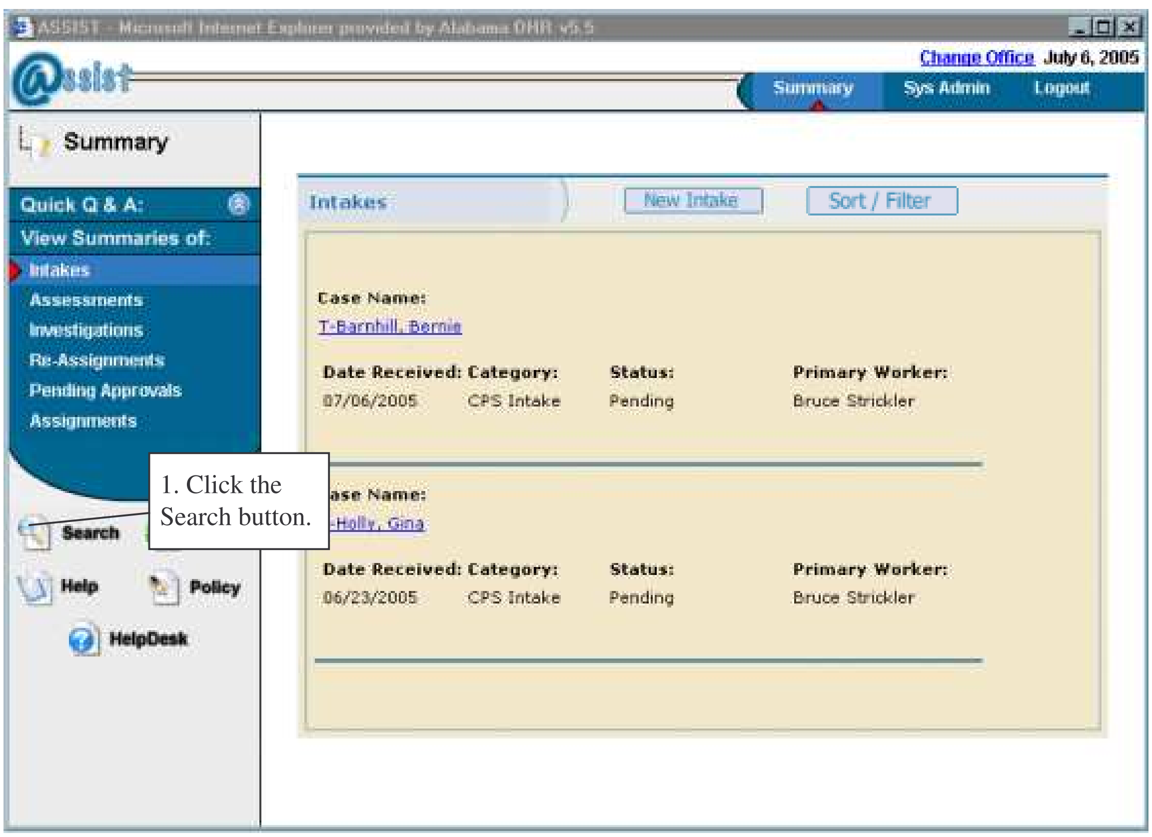
Merging Person Records

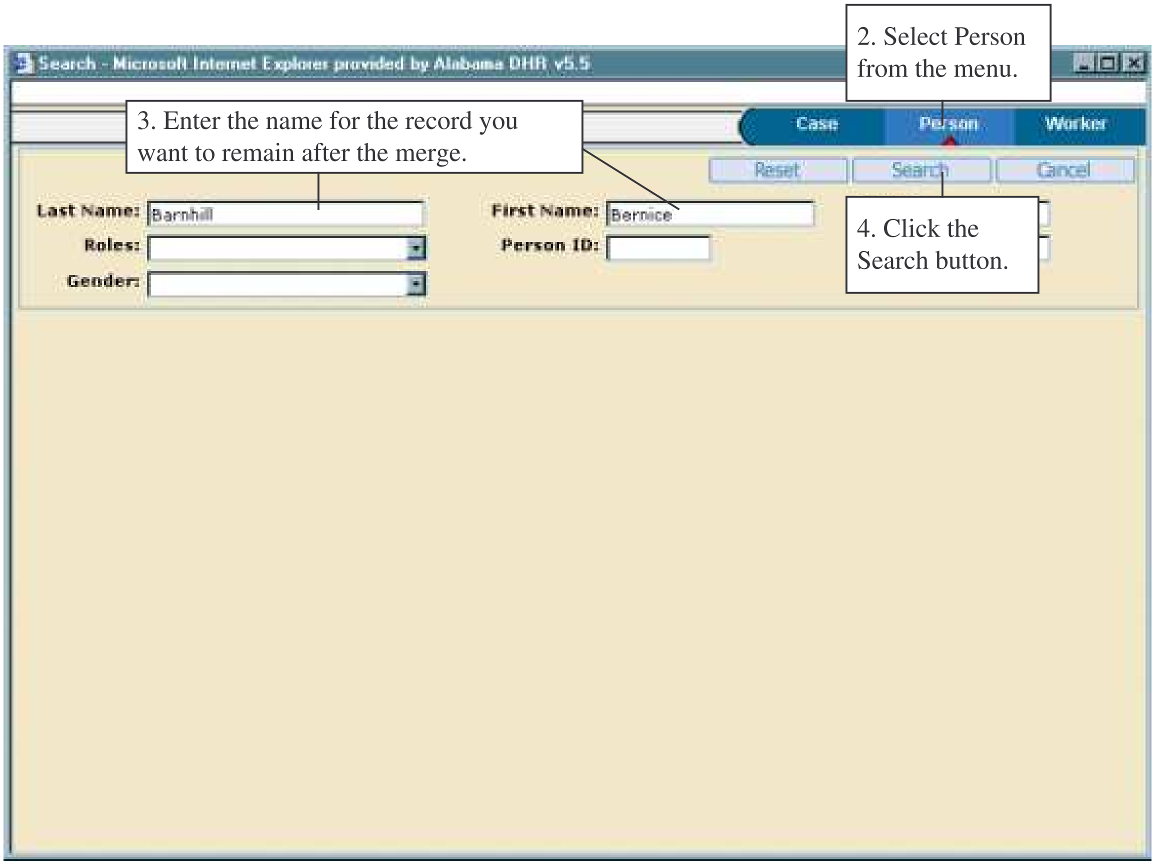
Purpose: The person merge function provides the means to combine duplicate records for the same person. **Only those specifically designated in their county office to have merge capability can perform merges.**

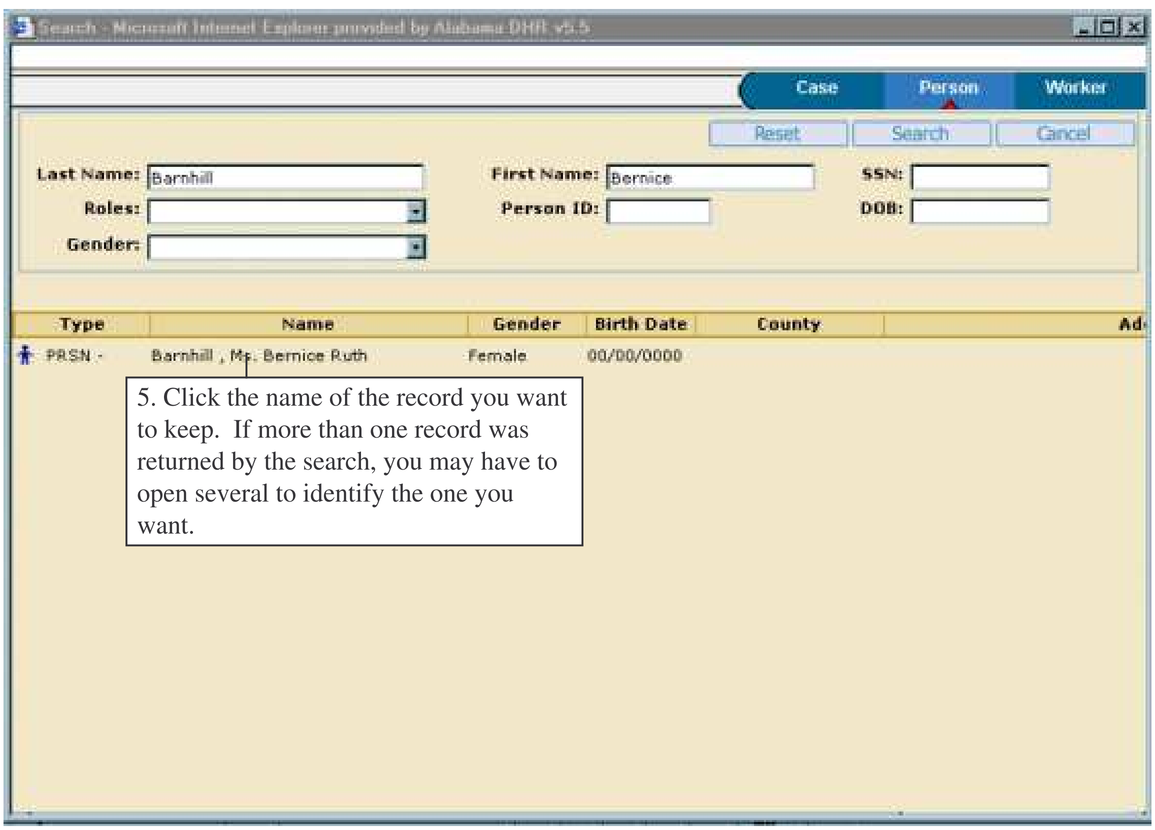
Overview: You may occasionally find that more than one record exists for the same person in ASSIST. Perhaps the person was entered under a different name. Maybe the worker who entered the second record did not complete a thorough search when they verified the person. No matter how the duplicate record was created, the desired goal is to only have one person record per person. Once a person record is merged into another, the remaining person replaces the merged person in all work to which they were linked. Also, the name from the merged person record is entered in the remaining person record as an Also Known As (AKA) name.

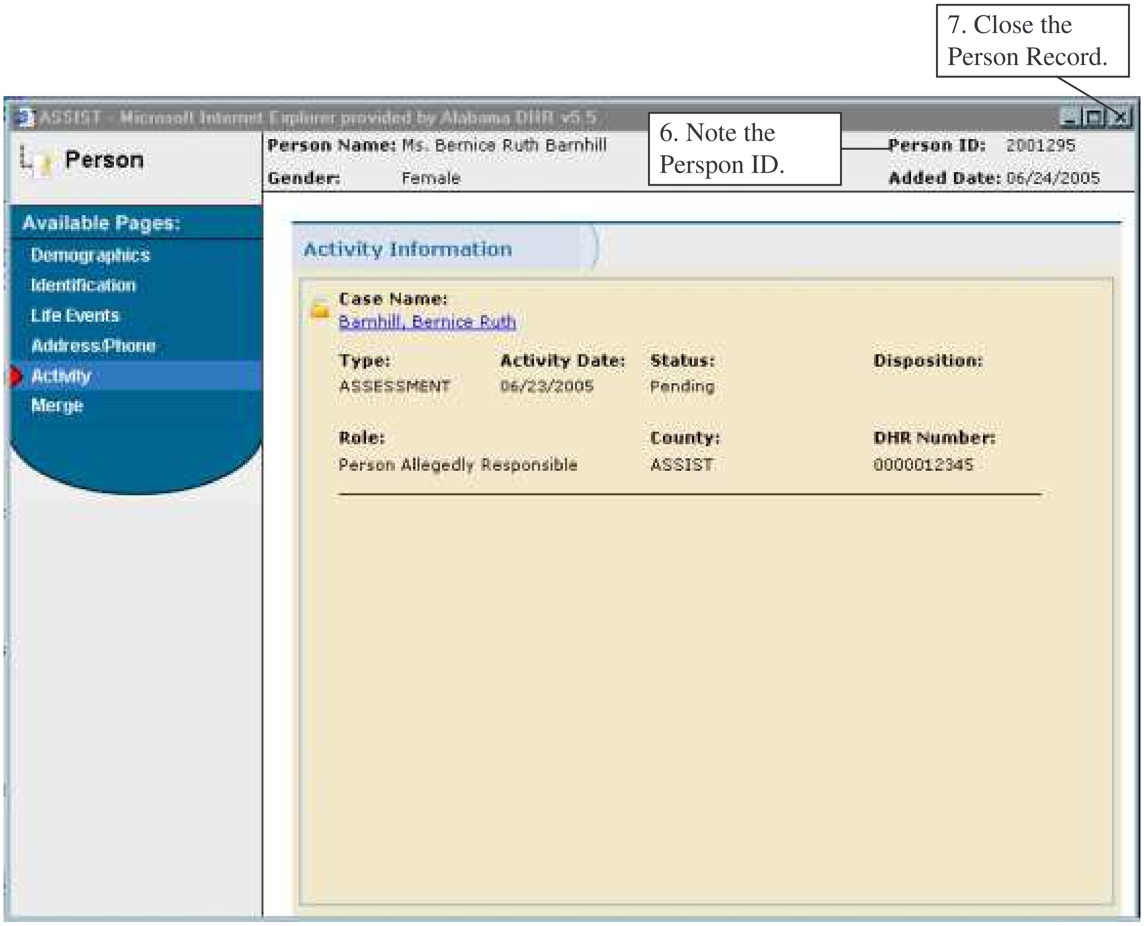
Person records are merged from the person record **that you want to keep**. You can open the person record from an intake, assessment, investigation, or search. The recommended procedure for merging person records follows:

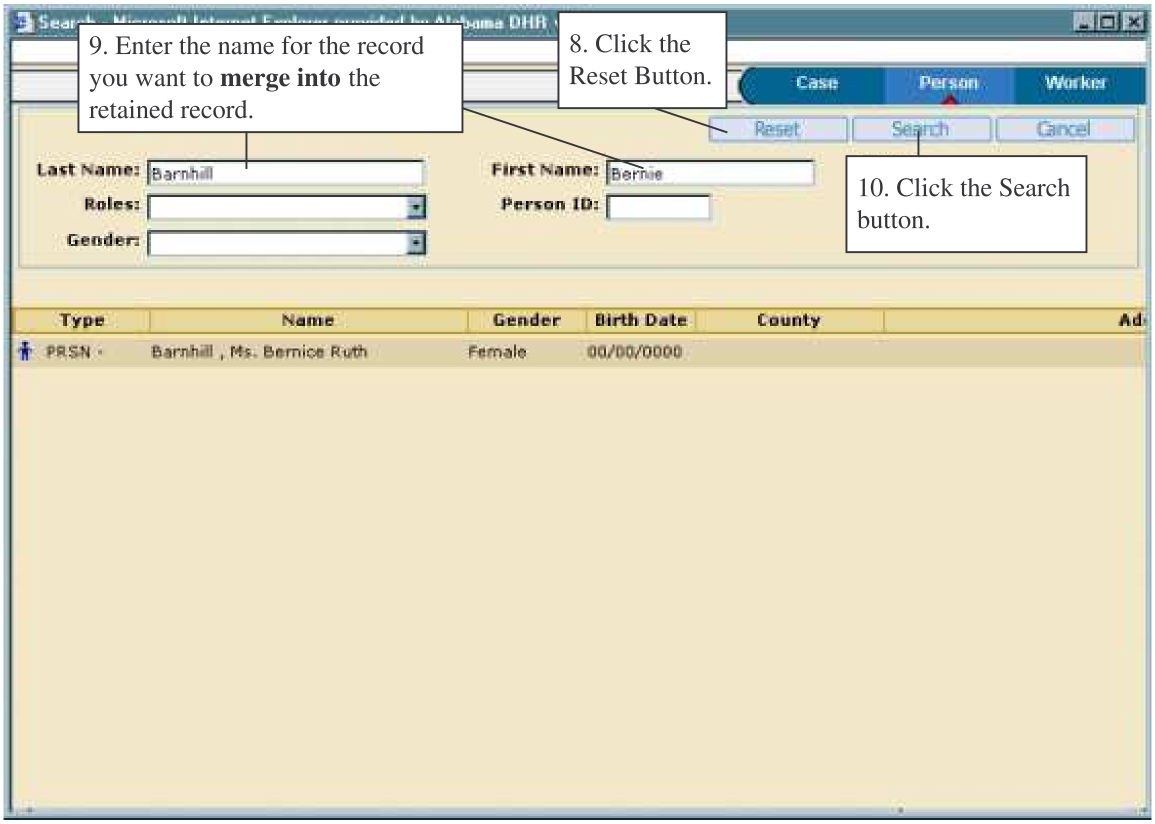
Before you begin the actual merge process, it is recommended that you identify the person records by **Person ID**. By using the Person ID, you will know exactly which record is which, especially if the name is identical on the two records. In this example, the person record for Bernie Barnhill will be merged into the record of Bernice Barnhill.

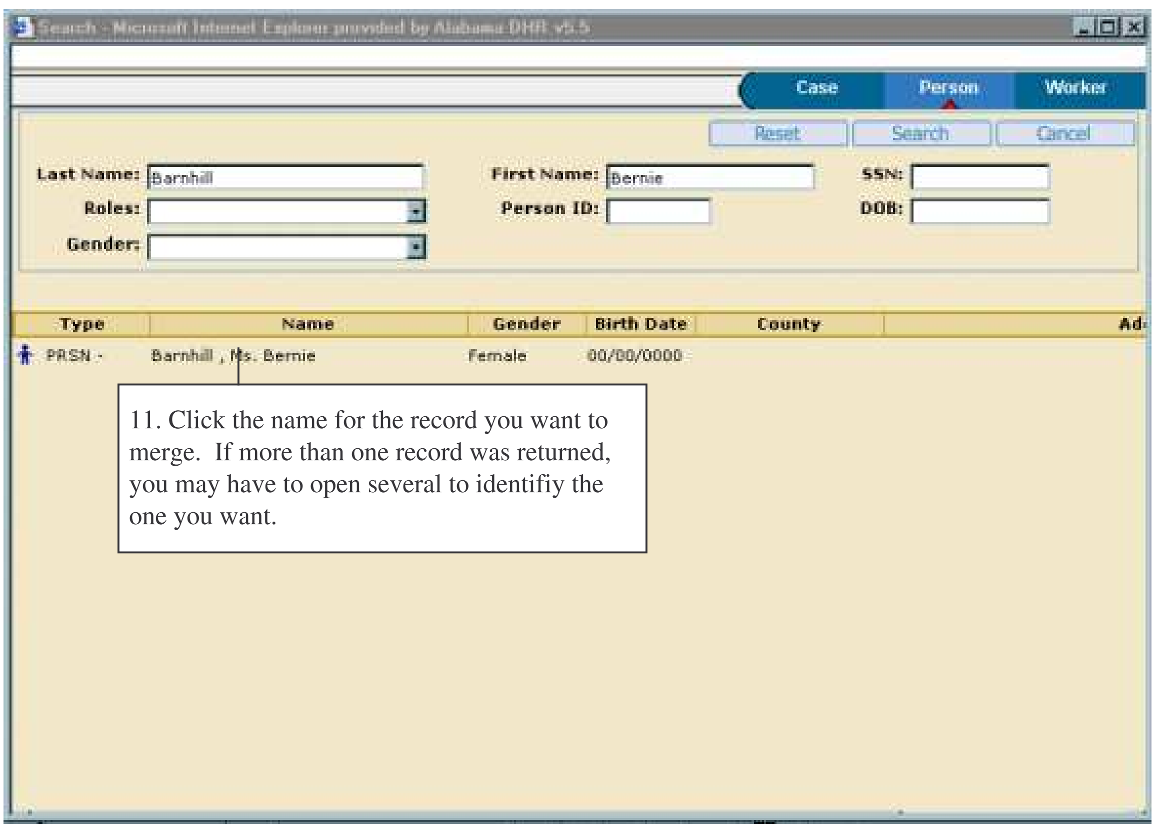



Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
2. Select Person from the menu.
Case
Person
Worker
3. Enter the name for the record you want to remain after the merge.
Reset
Search
Cancel
Last Name:
Barnhill
First Name:
Bernice
4. Click the Search button.
Roles:
Person ID:
Gender:


Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
Case
Person
Worker
Reset
Search
Cancel
Last Name:
Barnhill
First Name:
Bernice
SSN:
Roles:
Person ID:
DOB:
Gender:
Type
Name
Gender
Birth Date
County
PRSN -
Barnhill , Ms. Bernice Ruth
Female
00/00/0000
5. Click the name of the record you want to keep. If more than one record was returned by the search, you may have to open several to identify the one you want.

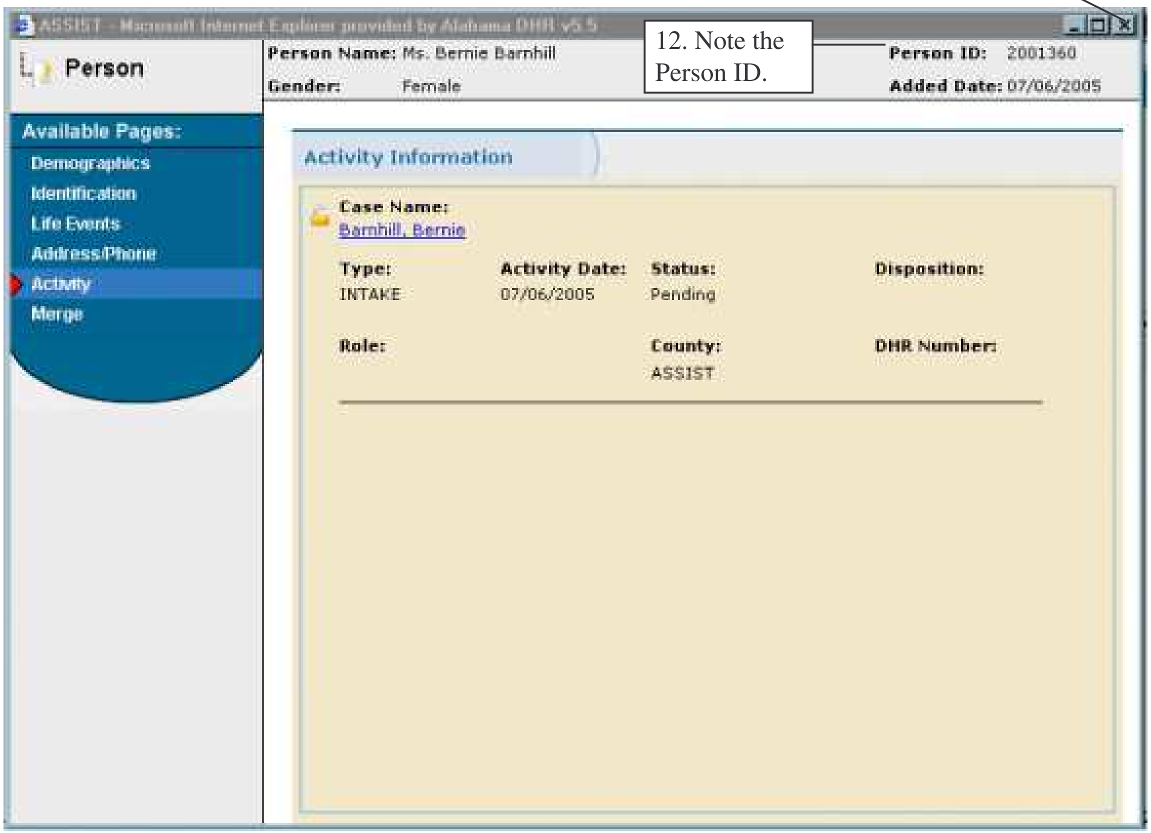

7. Close the Person Record.
ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Person
Person Name: Ms. Bernice Ruth Barnhill
Gender: Female
6. Note the Perspon ID.
Person ID: 2001295
Added Date: 06/24/2005
Available Pages:
Demographics
Identification
Life Events
Address/Phone
Activity
Merge
Activity Information
Case Name:
Barnhill, Bernice Ruth
Type: ASSESSMENT
Activity Date: 06/23/2005
Status: Pending
Disposition:
Role: Person Allegedly Responsible
County: ASSIST
DHR Number: 0000012345

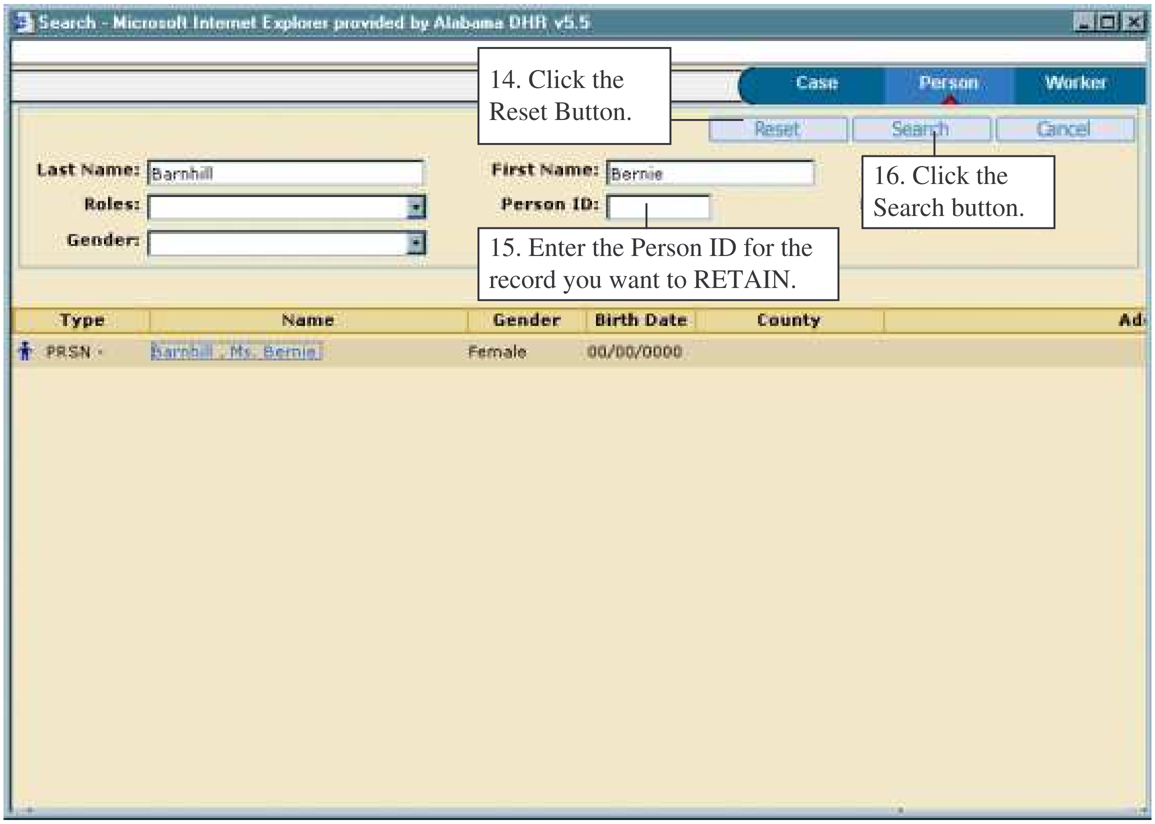

9. Enter the name for the record you want to **merge into** the retained record.
8. Click the Reset Button.
10. Click the Search button.
Case
Person
Worker
Reset
Search
Cancel
Last Name: Barnhill
First Name: Bernie
Roles:
Person ID:
Gender:
Type
Name
Gender
Birth Date
County
Ad
PRSN -
Barnhill , Ms. Bernice Ruth
Female
00/00/0000

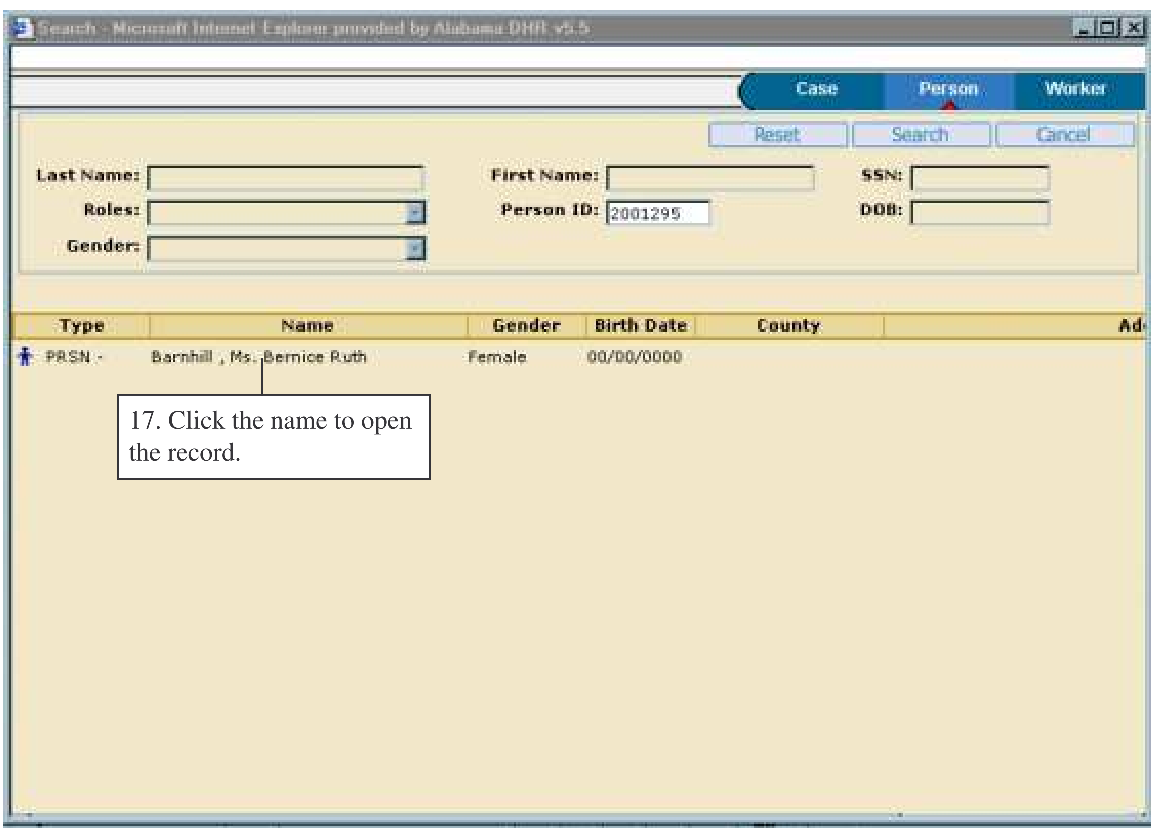

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
Case
Person
Worker
Reset
Search
Cancel
Last Name: Barnhill
First Name: Bernie
SSN:
Roles:
Person ID:
DOB:
Gender:
Type
Name
Gender
Birth Date
County
Ad
PRSN -
Barnhill , Ms. Bernie
Female
00/00/0000
11. Click the name for the record you want to merge. If more than one record was returned, you may have to open several to identifiy the one you want.

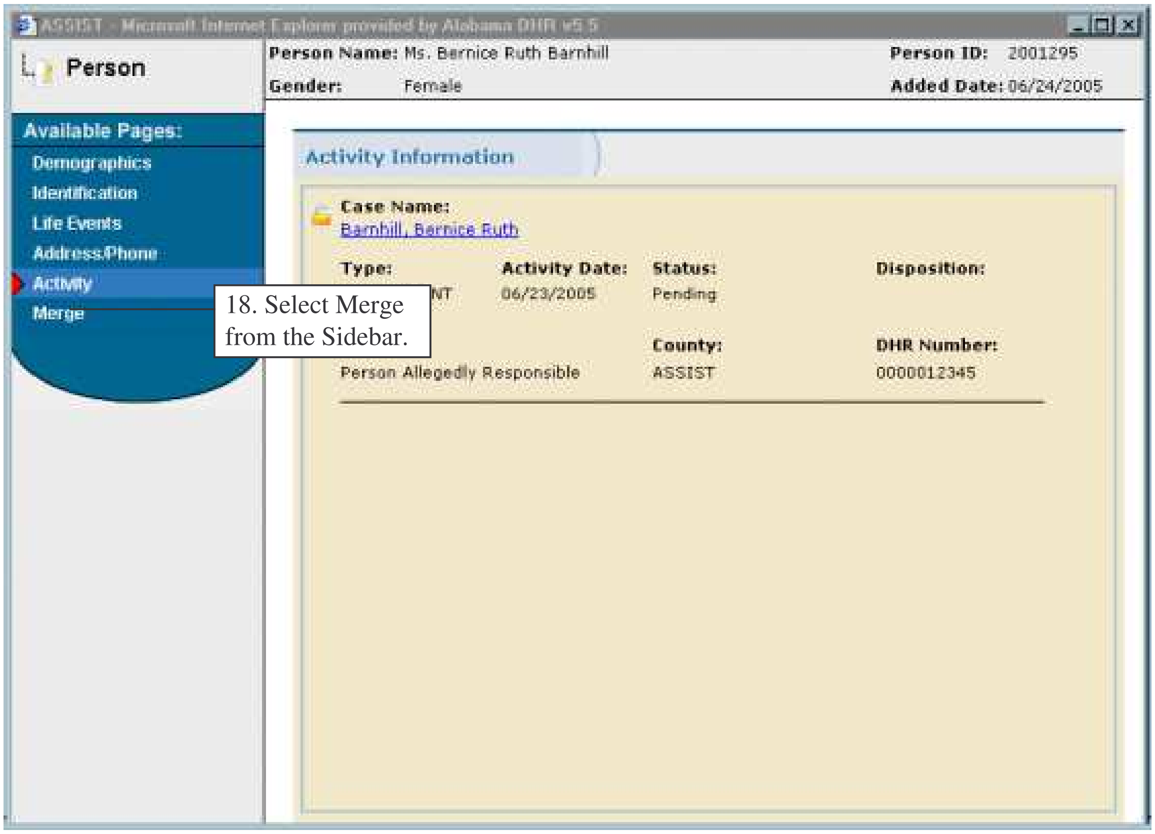
13. Close the Person Record.

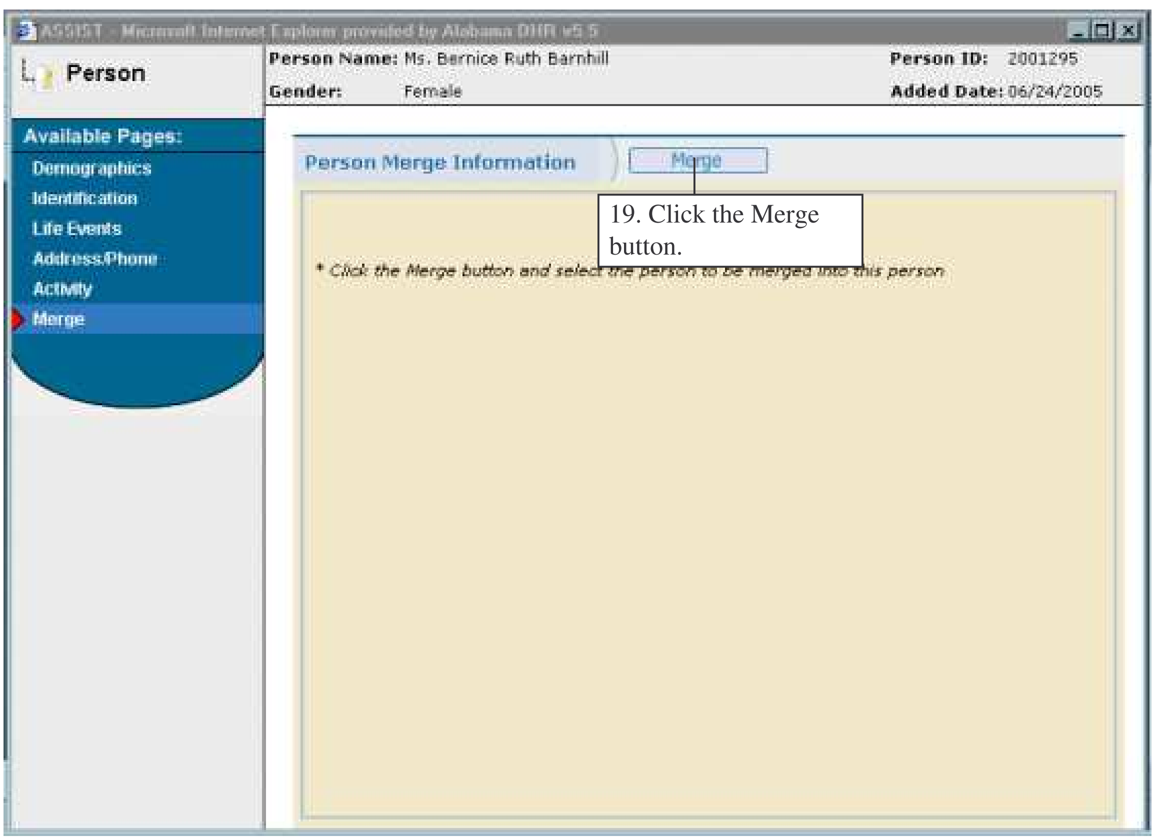
12. Note the Person ID.

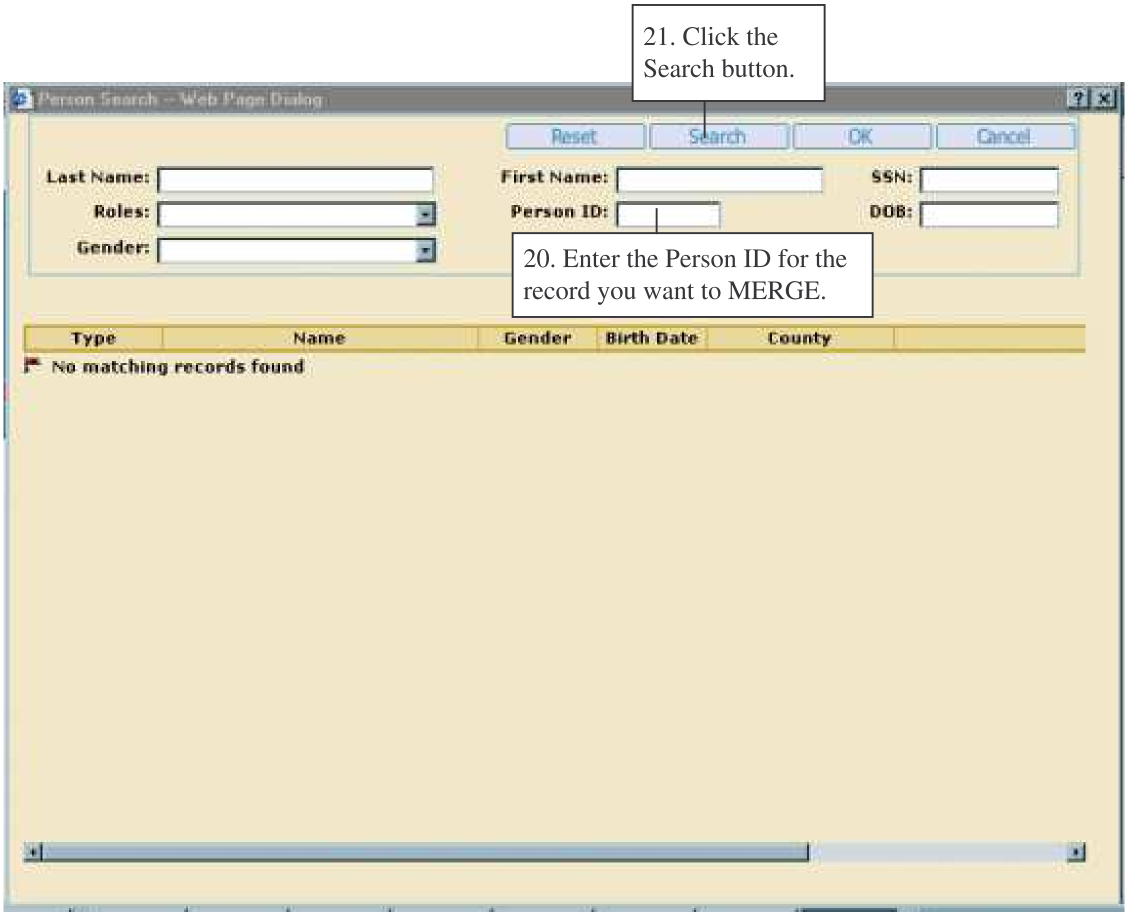


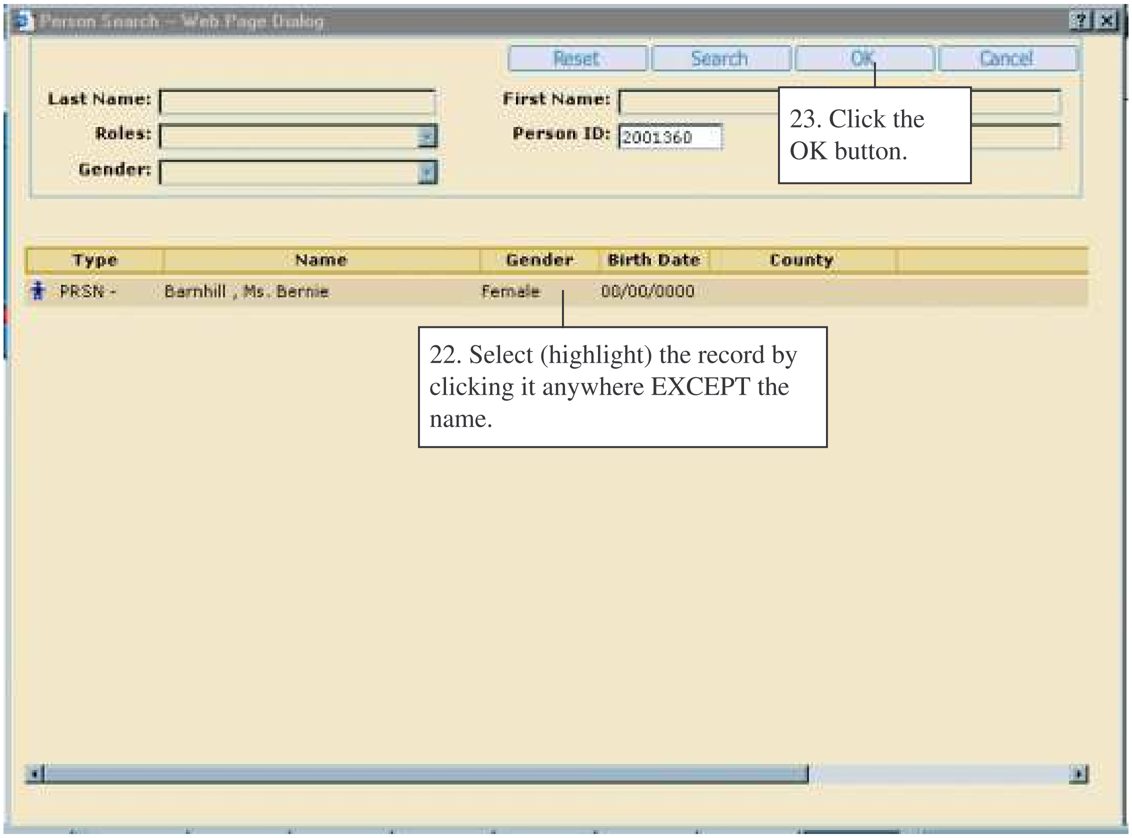

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
14. Click the Reset Button.
Case
Person
Worker
Reset
Search
Cancel
Last Name: Barnhill
First Name: Bernie
16. Click the Search button.
Roles:
Person ID:
Gender:
15. Enter the Person ID for the record you want to RETAIN.
Type
Name
Gender
Birth Date
County
PRSN -
Barnhill , Ms. Bernie
Female
00/00/0000

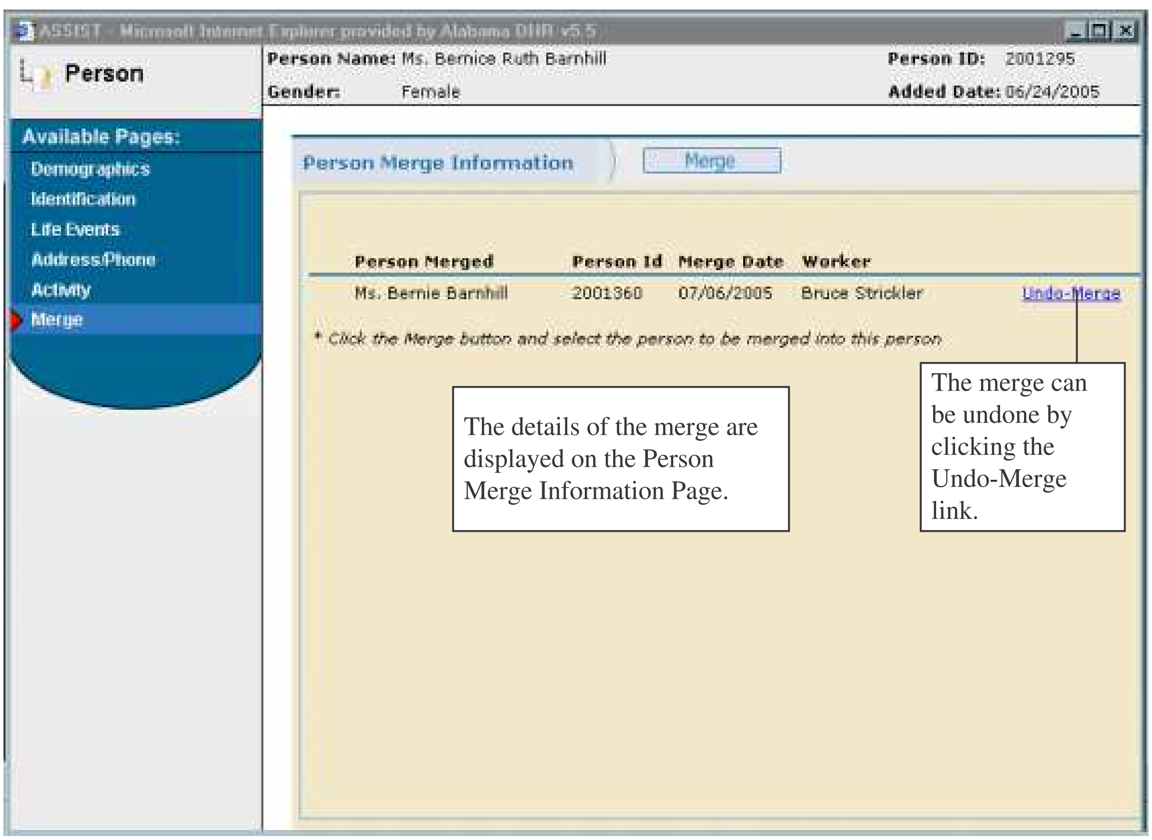

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
Case
Person
Worker
Reset
Search
Cancel
Last Name:
First Name:
SSN:
Roles:
Person ID: 2001295
DOB:
Gender:
Type
Name
Gender
Birth Date
County
PRSN -
Barnhill , Ms. Bernice Ruth
Female
00/00/0000
17. Click the name to open the record.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Person
Person Name: Ms. Bernice Ruth Barnhill
Person ID: 2001295
Gender: Female
Added Date: 06/24/2005
Available Pages:
Demographics
Identification
Life Events
Address/Phone
Activity
Merge
Activity Information
Case Name:
Barnhill, Bernice Ruth
Type:
Activity Date:
Status:
Disposition:
06/23/2005
Pending
County:
DHR Number:
Person Allegedly Responsible
ASSIST
0000012345
18. Select Merge from the Sidebar.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Person
Person Name: Ms. Bernice Ruth Barnhill
Person ID: 2001295
Gender: Female
Added Date: 06/24/2005
Available Pages:
Demographics
Identification
Life Events
Address/Phone
Activity
Merge
Person Merge Information
Merge
19. Click the Merge button.
* Click the Merge button and select the person to be merged into this person


21. Click the Search button.
Person Search -- Web Page Dialog
Reset
Search
OK
Cancel
Last Name:
First Name:
SSN:
Roles:
Person ID:
DOB:
Gender:
20. Enter the Person ID for the record you want to MERGE.
Type
Name
Gender
Birth Date
County
No matching records found


Person Search -- Web Page Dialog
Reset
Search
OK
Cancel
Last Name:
Roles:
Gender:
First Name:
Person ID: 2001360
23. Click the OK button.
Type
Name
Gender
Birth Date
County
PRSN -
Barnhill , Ms. Bernie
Female
00/00/0000
22. Select (highlight) the record by clicking it anywhere EXCEPT the name.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Person
Person Name: Ms. Bernice Ruth Barnhill
Person ID: 2001295
Gender: Female
Added Date: 06/24/2005
Available Pages:
Demographics
Identification
Life Events
Address/Phone
Activity
Merge
Person Merge Information
Merge
Person Merged
Person Id
Merge Date
Worker
Ms. Bernie Barnhill
2001360
07/06/2005
Bruce Strickler
Undo-Merge
* Click the Merge button and select the person to be merged into this person
The details of the merge are displayed on the Person Merge Information Page.
The merge can be undone by clicking the Undo-Merge link.

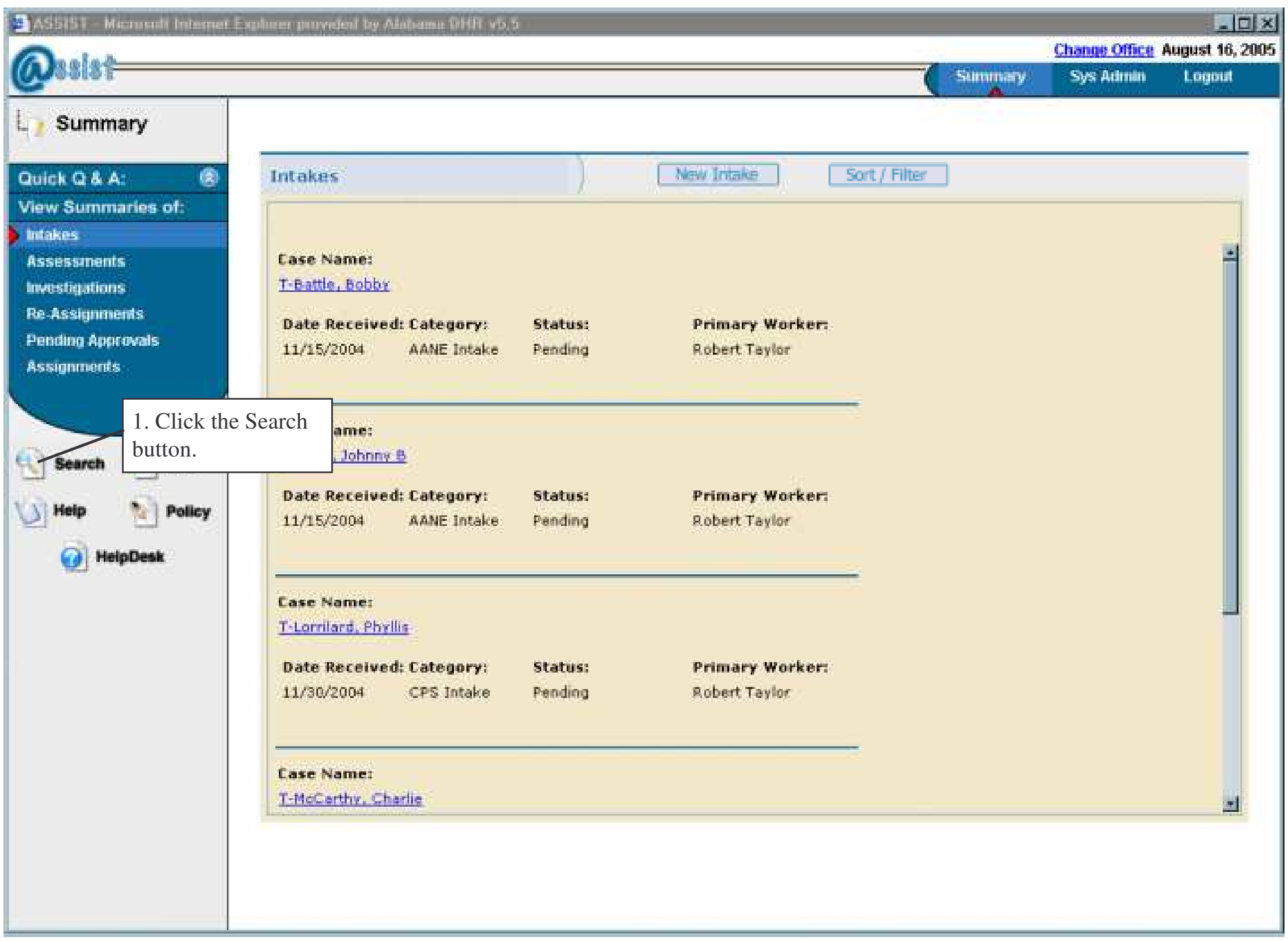
Merging Cases

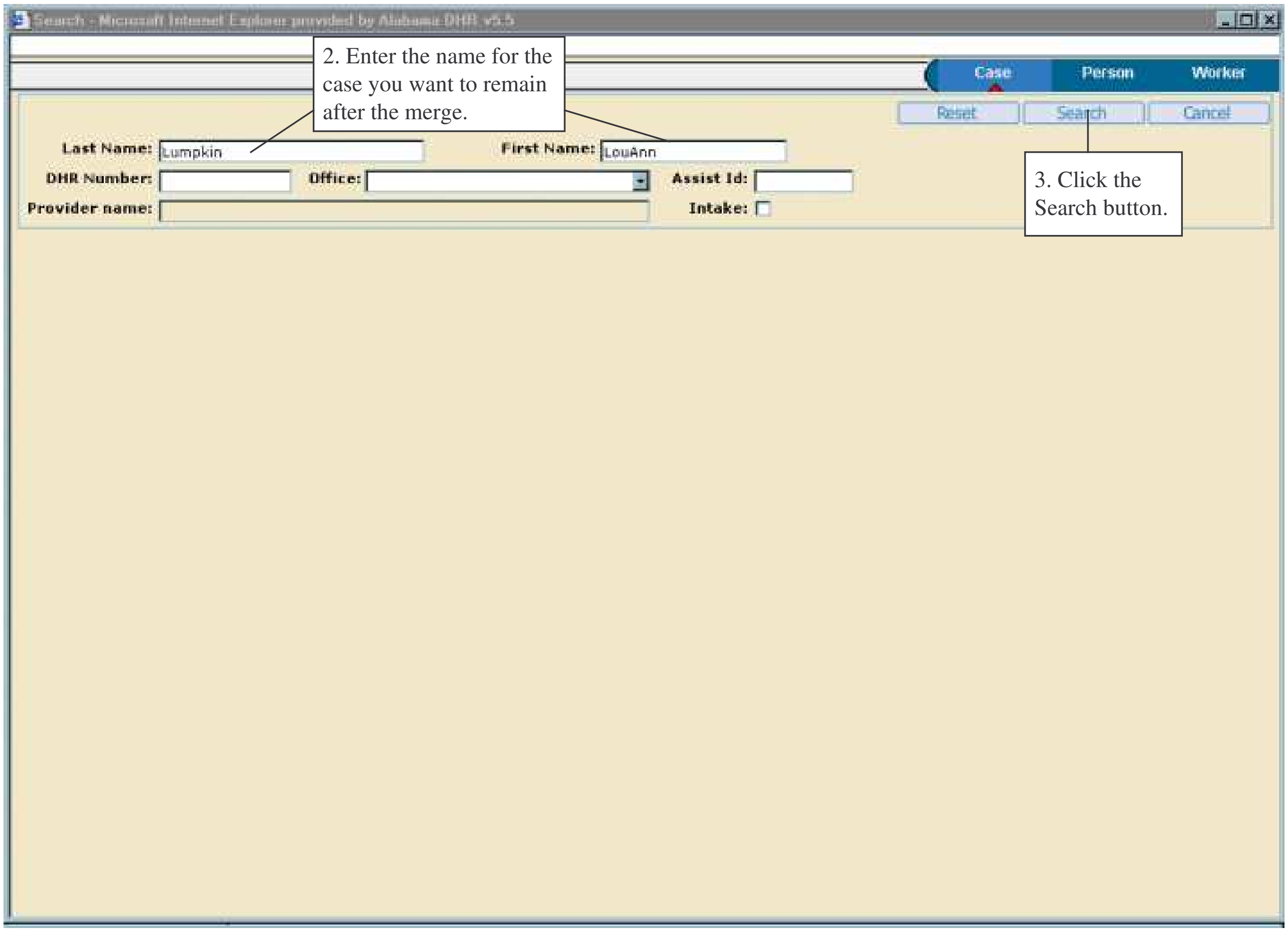
Purpose: The case merge function provides the means to combine duplicate cases for the same person or family. **Only those specifically designated in their county office to have merge capability can perform merges.**

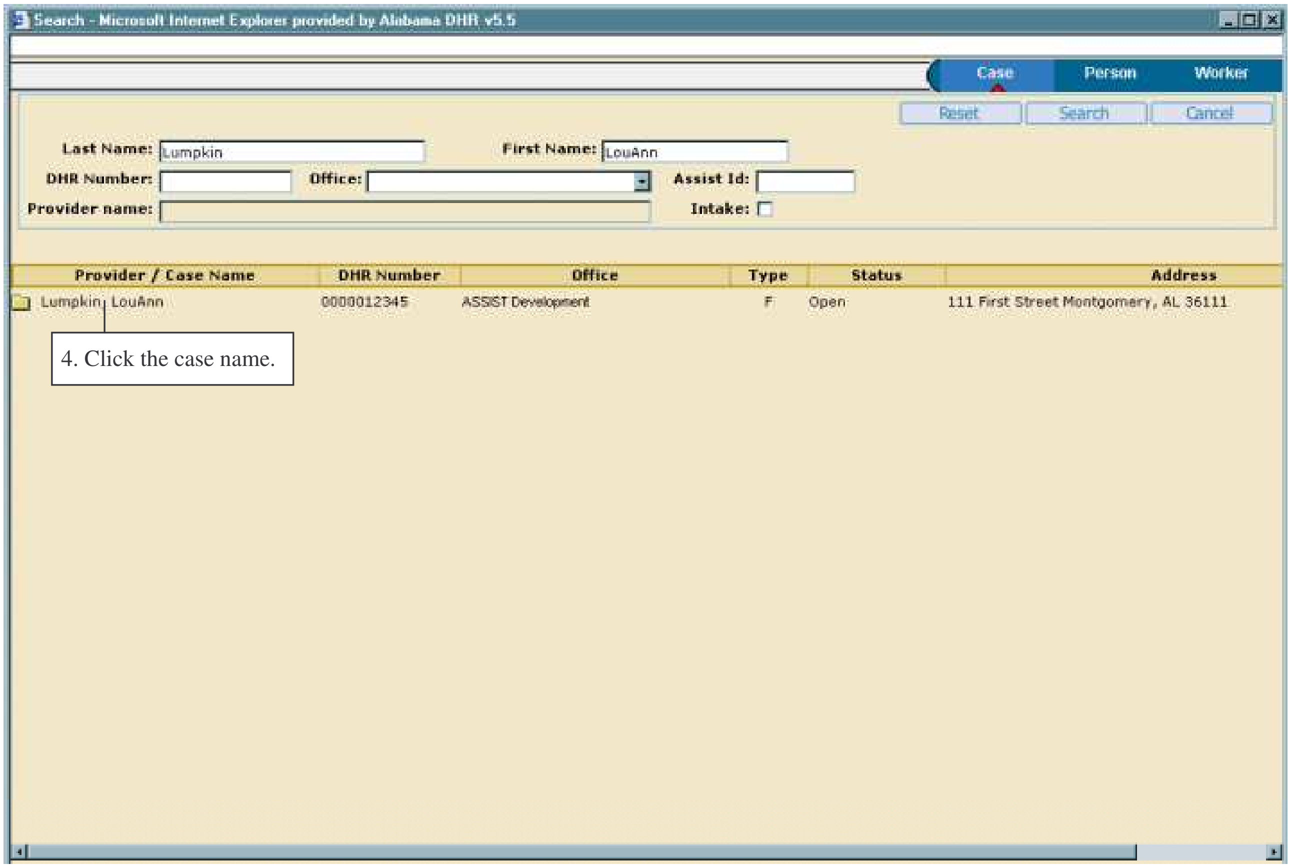
Overview: You may occasionally find that more than one case exists for the same person or family in ASSIST. Perhaps the case was entered under a different name. Maybe the supervisor who created the second case did not complete a thorough search when they accepted the intake. No matter how the duplicate case was created, the desired goal is to only have one case per person/family.

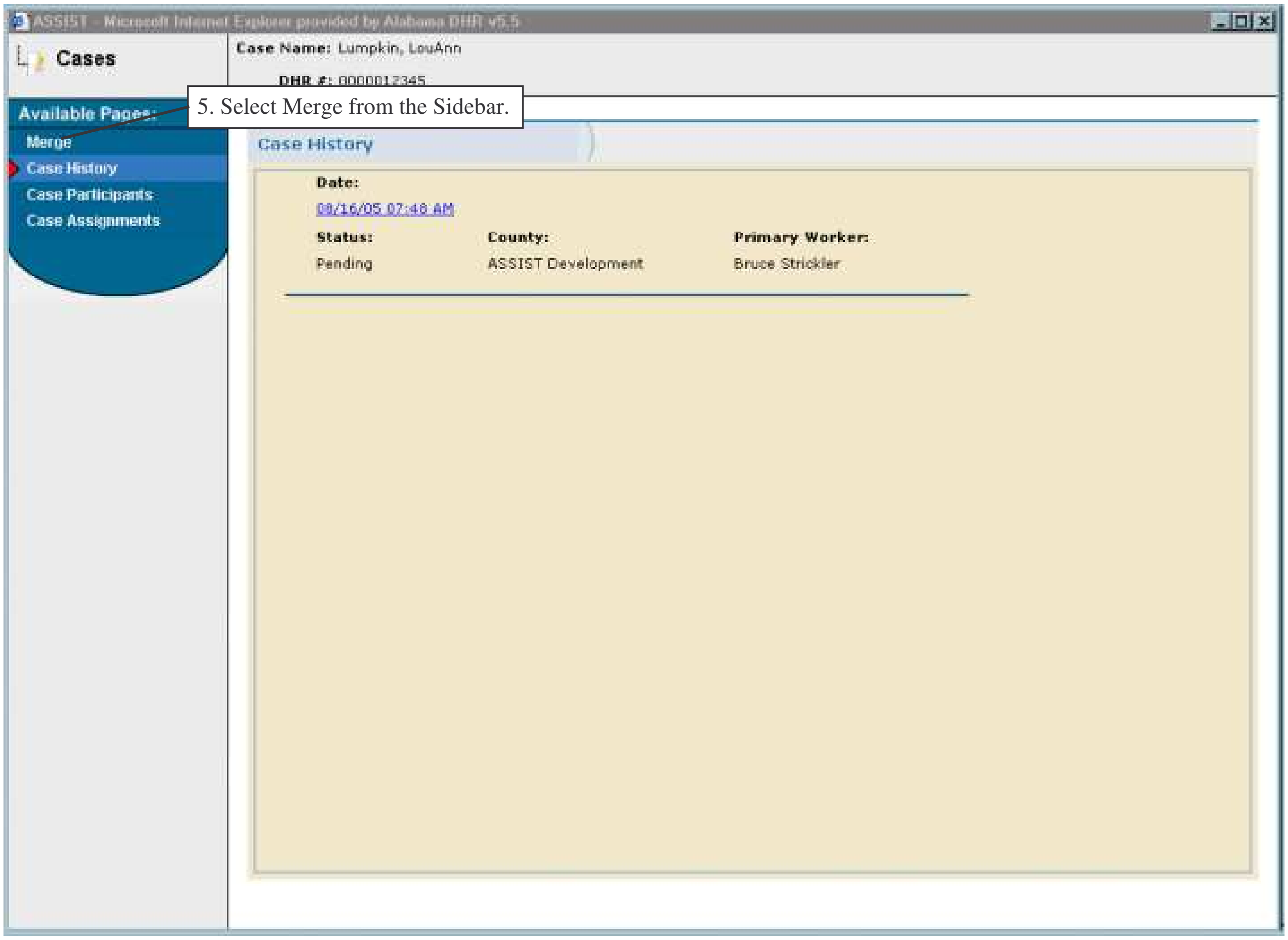
Cases are merged from the Search page. The recommended procedure for merging cases follows:

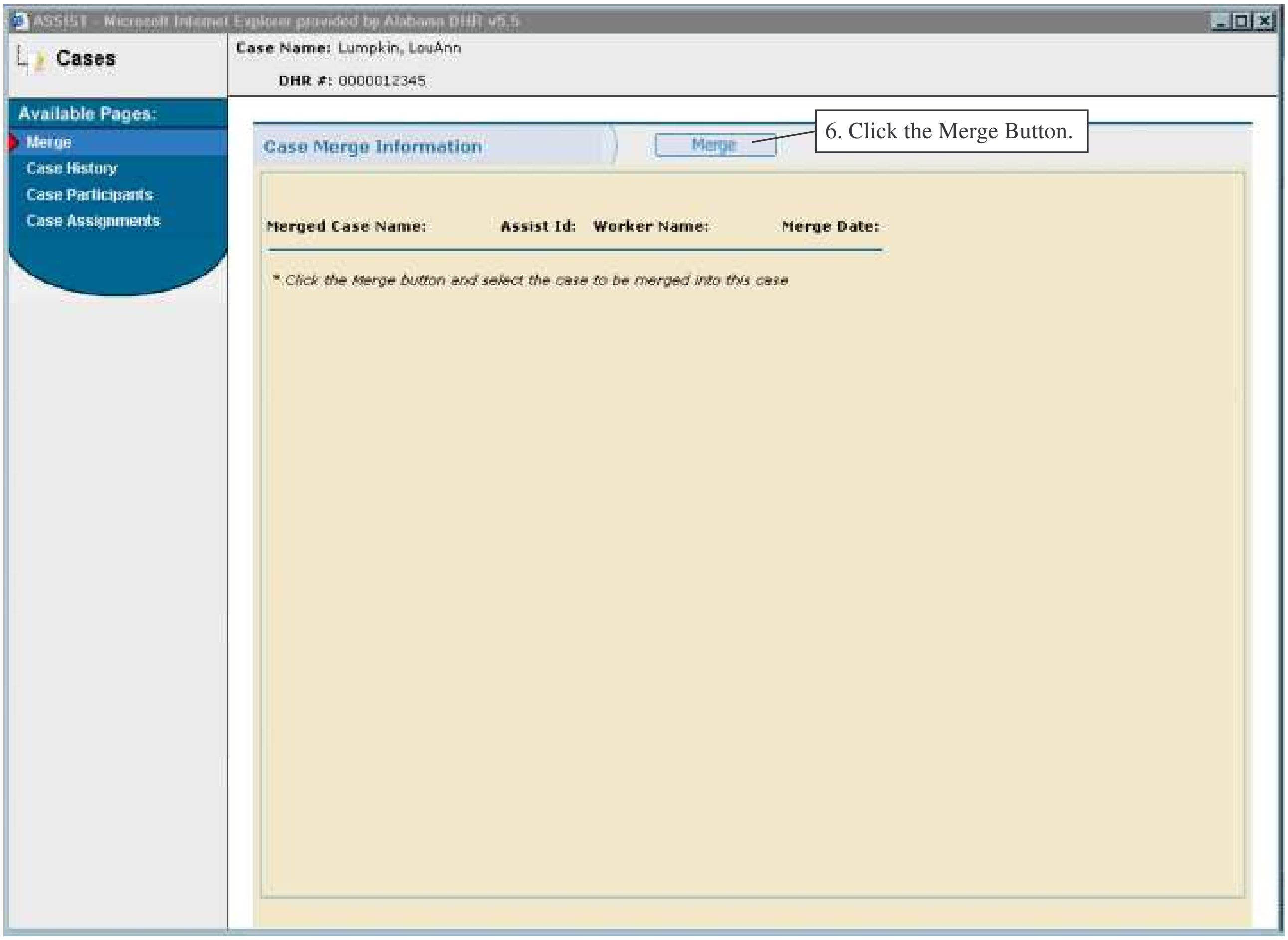
In this example, the case for Ann Lumpkin will be merged into the case for LouAnn Lumpkin.

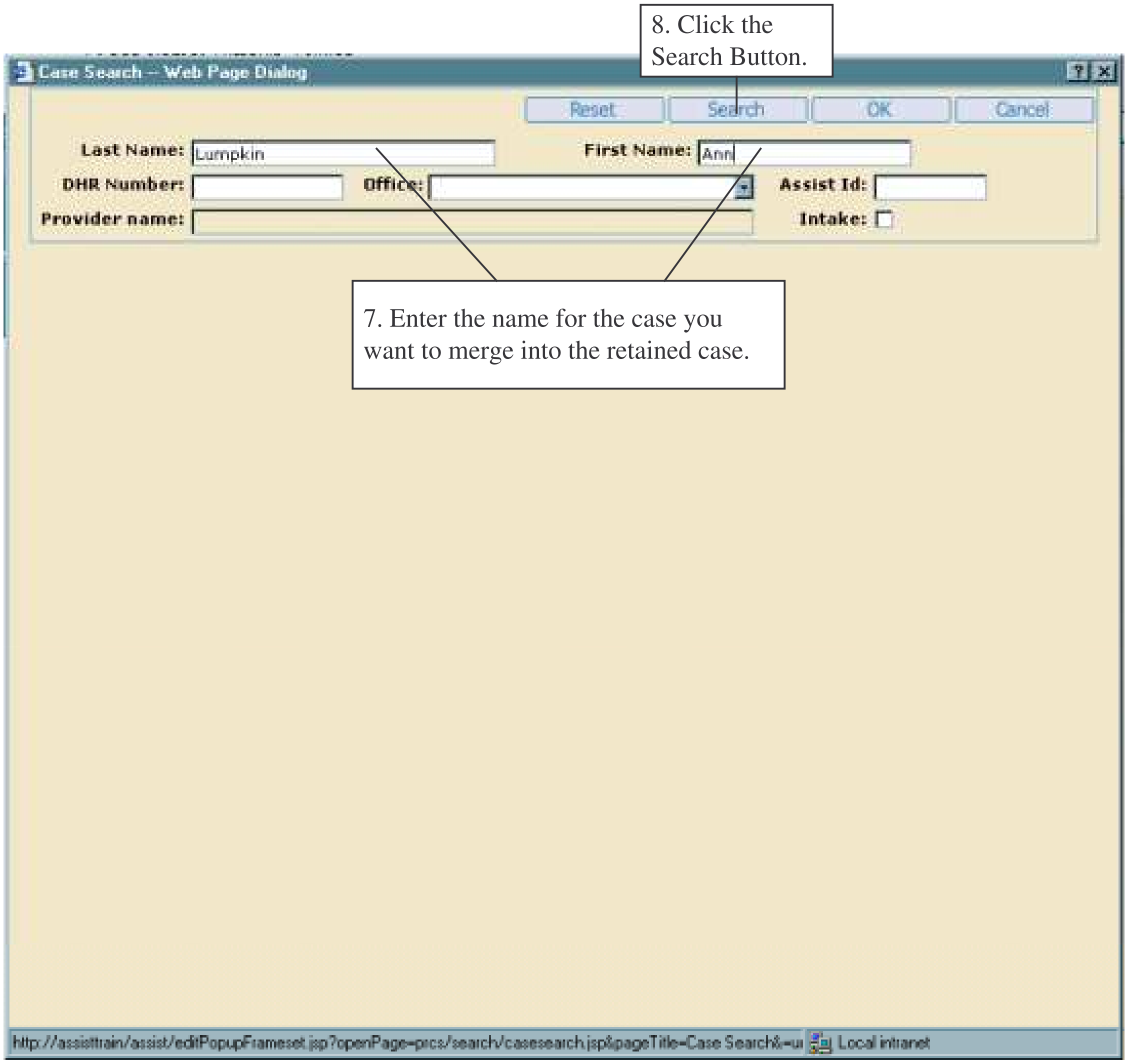


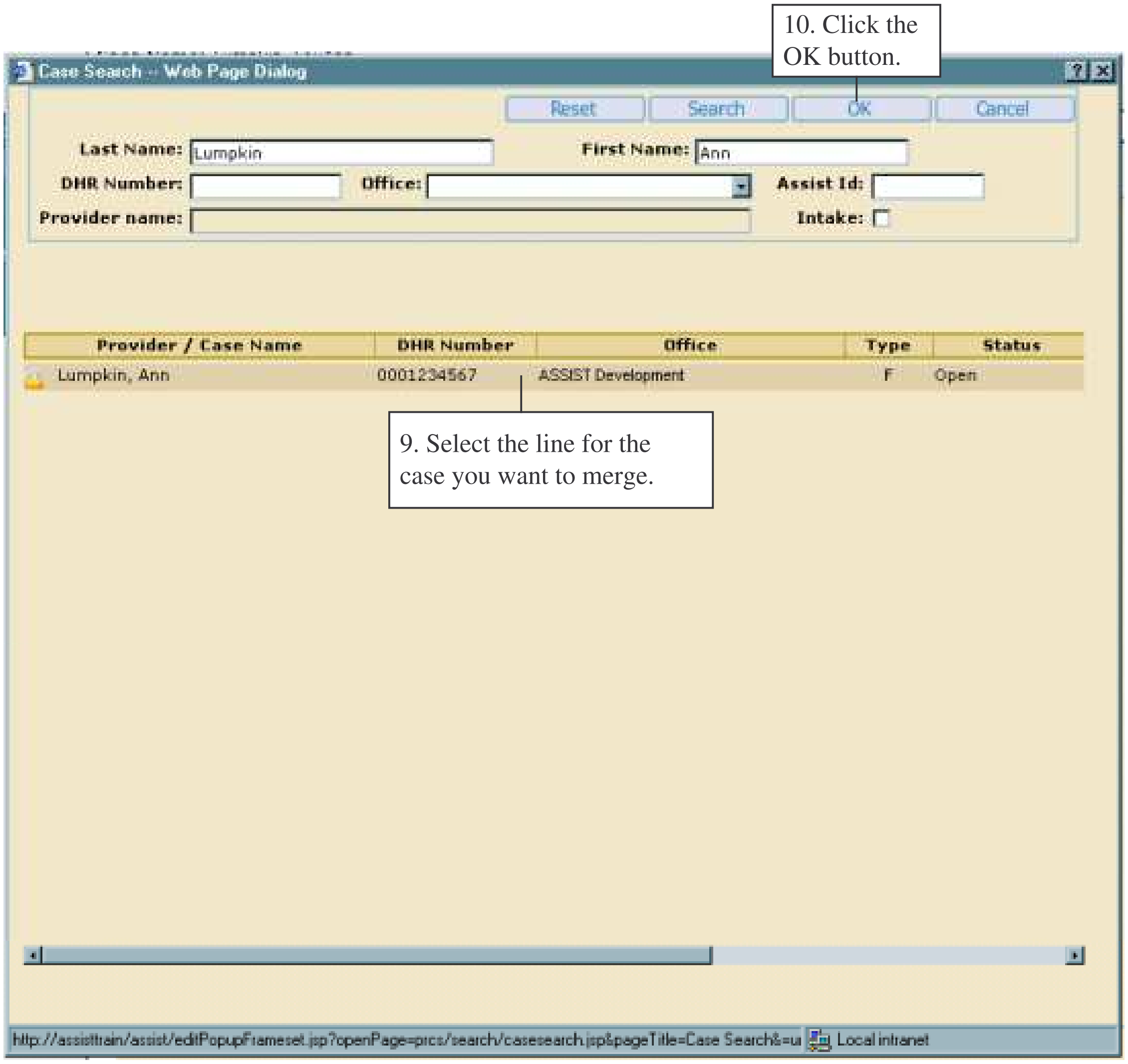

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
2. Enter the name for the case you want to remain after the merge.
Case
Person
Worker
Reset
Search
Cancel
Last Name:
Lumpkin
First Name:
LouAnn
DHR Number:
Office:
Assist Id:
Provider name:
Intake:
3. Click the Search button.

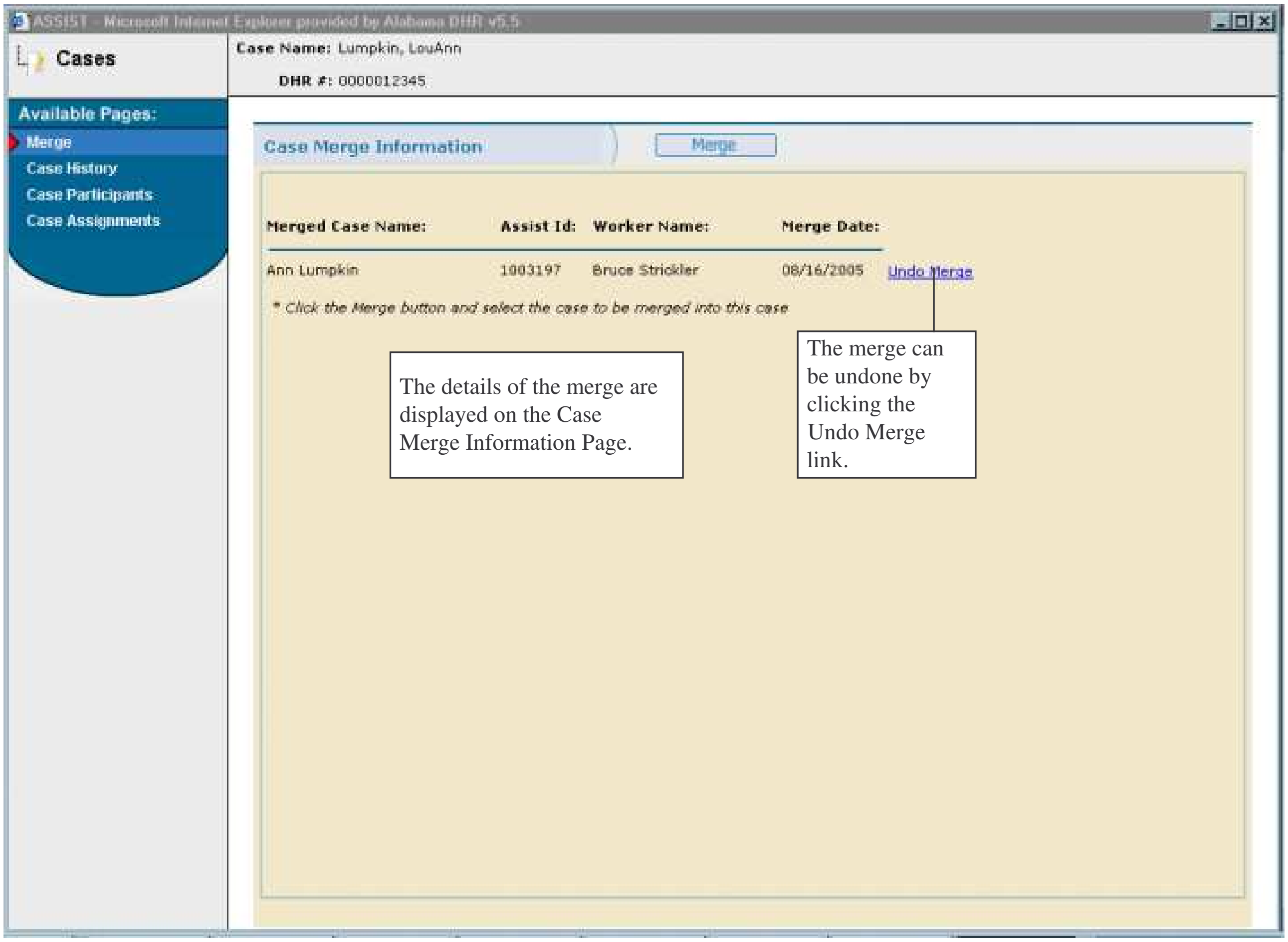

Search - Microsoft Internet Explorer provided by Alabama DHR v5.5
Case
Person
Worker
Reset
Search
Cancel
Last Name: Lumpkin
First Name: LouAnn
DHR Number:
Office:
Assist Id:
Provider name:
Intake:
Provider / Case Name
DHR Number
Office
Type
Status
Address
Lumpkin, LouAnn
0000012345
ASSIST Development
F
Open
111 First Street Montgomery, AL 36111
4. Click the case name.


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Cases
Case Name: Lumpkin, LouAnn
DHR #: 0000012345
Available Pages:
5. Select Merge from the Sidebar.
Merge
Case History
Case Participants
Case Assignments
Case History
Date:
08/16/05 07:48 AM
Status:
Pending
County:
ASSIST Development
Primary Worker:
Bruce Strickler


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Cases
Case Name: Lumpkin, LouAnn
DHR #: 0000012345
Available Pages:
Merge
Case History
Case Participants
Case Assignments
Case Merge Information
Merge
6. Click the Merge Button.
Merged Case Name:
Assist Id:
Worker Name:
Merge Date:
* Click the Merge button and select the case to be merged into this case


8. Click the Search Button.
Case Search -- Web Page Dialog
Reset
Search
OK
Cancel
Last Name:
Lumpkin
First Name:
Ann
DHR Number:
Office:
Assist Id:
Provider name:
Intake:
7. Enter the name for the case you want to merge into the retained case.
Local intranet


10. Click the OK button.
Case Search -- Web Page Dialog
Reset
Search
OK
Cancel
Last Name: Lumpkin
First Name: Ann
DHR Number:
Office:
Assist Id:
Provider name:
Intake:
Provider / Case Name
DHR Number
Office
Type
Status
Lumpkin, Ann
0001234567
ASSIST Development
F
Open
9. Select the line for the case you want to merge.
http://assisttrain/assist/editPopupFrameset.jsp?openPage=prcs/search/casesearch.jsp&pageTitle=Case Search&=u
Local intranet


ASSIST - Microsoft Internet Explorer provided by Alabama DHR v5.5
Cases
Case Name: Lumpkin, LouAnn
DHR #: 0000012345
Available Pages:
Merge
Case History
Case Participants
Case Assignments
Case Merge Information
Merge
Merged Case Name:
Assist Id:
Worker Name:
Merge Date:
Ann Lumpkin
1003197
Bruce Strickler
08/16/2005
Undo Merge
* Click the Merge button and select the case to be merged into this case
The details of the merge are displayed on the Case Merge Information Page.
The merge can be undone by clicking the Undo Merge link.

Recommended Procedures for Obtaining Assistance

People who use ASSIST should try to obtain assistance from the most immediate level of help available. This will ensure that all users can receive the assistance they need as quickly as possible.

The levels of assistance in using ASSIST are:

Level 1 - User Guide/ASSIST System Help
Level 2 - County ASSIST Mentor
Level 3 - ASSIST Help Desk

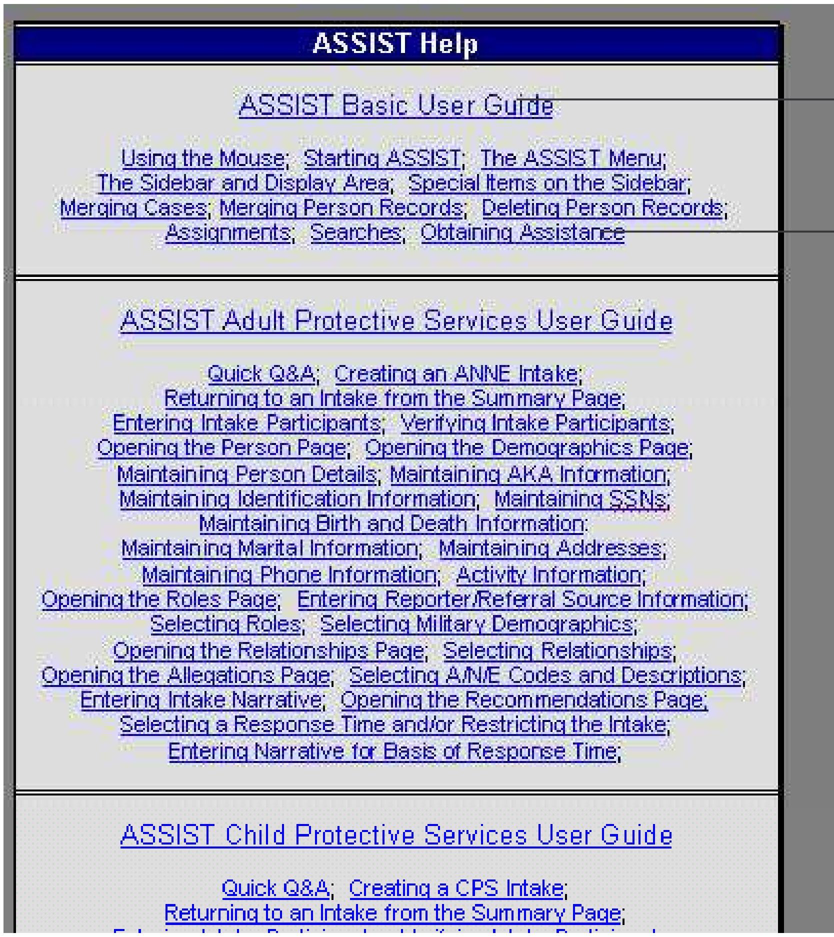
The User Guide/ASSIST System Help

Every ASSIST user has access to the User Guide online. It provides step-by-step instructions for performing all of the tasks in ASSIST. It is made up of five volumes (see page 5, Introduction for details). It is also available on the DHR Intranet through the Online Documents shortcut through your ASSIST mentor.

The same information that is available from the user guide is also available from ASSIST Help. ASSIST Help provides access to each user guide as a whole or to individual sections of the user guide. To use ASSIST Help:

1. Click the Help button located under the Sidebar.

The ASSIST Help page opens.



2. Click the User Guide header to open the guide at the beginning of the document.

OR

Click a section title to go directly to that section.

County ASSIST Mentor

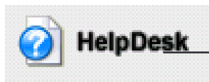
Your county ASSIST mentor has been provided extra ASSIST training to be able to perform more advanced tasks than the average worker. This does not make them ASSIST experts, but it does give them an advantage when trying to understand how to perform a task.

ASSIST Help Desk

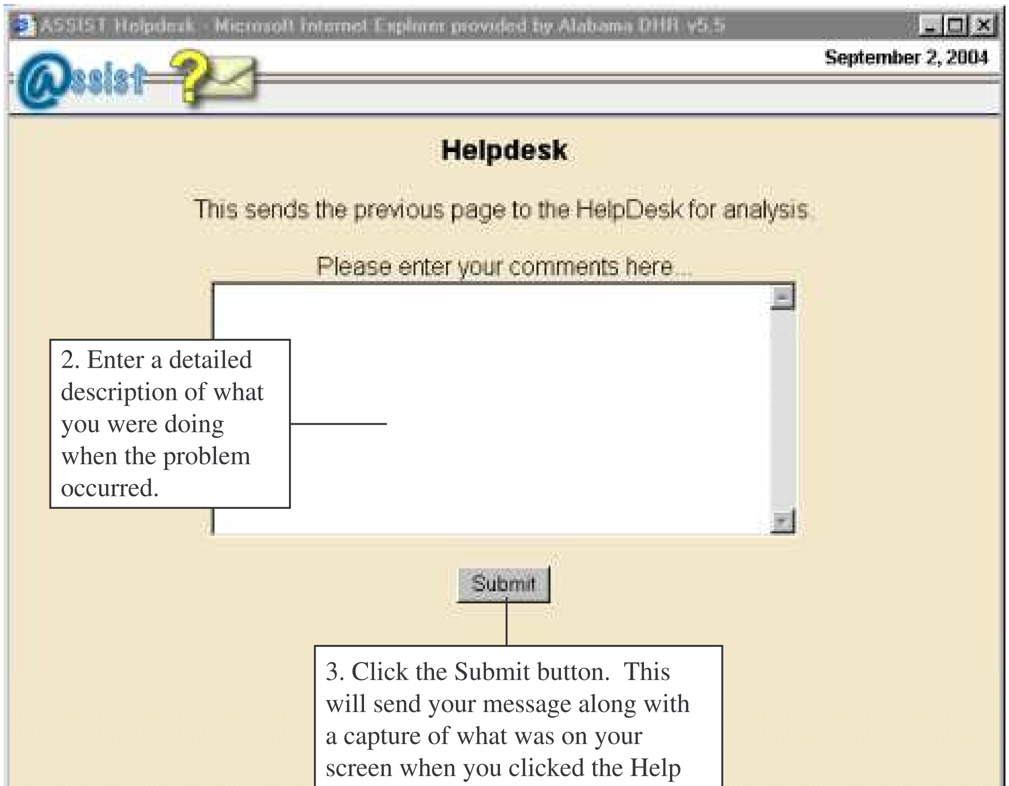
If your mentor is not able to provide the help you need, they can contact the ASSIST Help Desk. The ASSIST Help Desk has people who have advanced training on ASSIST functionality. If they do not know the answer to a problem or question, they will be able to find the answer quickly. They will also know the answer the next time someone calls with the same question. The ASSIST Help Desk can be reached by phone from **7a.m. to 5p.m. Monday through Friday** at **1-800-429-9508 option #6**. If you are transferred to voice mail, make sure to leave your **name**, **office**, telephone number (**ATTNET preferred or include your area code**), a **brief** description of the problem, and the **name of the intake, investigation, or assessment** involved.

ASSIST Help Desk Button

If the problem is a system error, you should send the request through the system. To send the Help Desk a message from ASSIST:



1. Click the Help Desk button located under the Sidebar.



2. Enter a detailed description of what you were doing when the problem occurred.

3. Click the Submit button. This will send your message along with a capture of what was on your screen when you clicked the Help Desk button.

This method should only be used when a system error occurs because it sends detailed technical information to the Help Desk along with the comments you entered. Be sure to include your **name**, **office**, telephone number (**ATTNET preferred or include your area code**), a **brief** description of the problem, and the **name of the intake, investigation, or assessment** involved in the message.